

NAVAL SUPPLY SYSTEMS COMMAND

Quality Document System

QUADS User Manual

Version 2.1

QUALITY DOCUMENT SYSTEM

QUADS User Manual

Naval Supply Systems Command

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Chapter

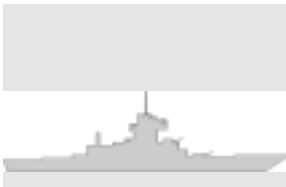
1

Welcome to QUADS

This user manual is designed to enable users to quickly become productive using QUADS to develop collaborative documents.

QUADS, the Quality Document System, is deployed to support the coordinated development of logistics publications and instructions across organizational boundaries, to increase effective participation of the functional experts, and to reduce the time required to prepare a publication for formal staffing through the chop chain.

Background



Conferences on Naval Warfare Publications (NWP) and doctrine were common during the late 1970s. Flag officers instructed subject matter experts to gather at a location chosen by the NWP sponsor in response to a real need to decrease the “policy - practice” gap.

Naval Supply Corps publication development required an inordinate amount of staff time. Various levels of staff from flag to squadron level were involved in developing, revising, commenting, and staffing documents such as NWP instructions and publications. This process usually required several months at a minimum, expense of travel and lodging, and time away from duty station to “conclave” with other subject matter experts and staff representatives.

With forced downsizing, reduced budgets, and dramatically greater demands on staff personnel, there is little time or funding today for staff representatives to meet for several days to review, markup, and comment on draft documents.

Description

QUADS was developed to address an immediate need to expedite Navy logistics program policy development. It leverages state-of-the-market technology to provide a highly reliable and cost-effective solution based upon widely used commercial-off-the-shelf (COTS) packages.

The QUADS user works in a Windows-based document editing and publishing environment, which allows for “different time - different place” workgroup collaboration in drafting documents. There are two ways to access QUADS. The first is via the World Wide Web (WWW), in which any web browser can be used. There is a separate QUADS user manual that describes the use of the Internet version of QUADS. Highlights are discussed briefly here.

- ❑ **WWW QUADS.** Through the use of NAVSUP's Lotus Notes Domino server, it is possible to participate in QUADS interactively via the WWW at the following URL address: <<http://www.quads.navsup.navy.mil>>.

The second way to access QUADS is through Lotus Notes client software, which is the focus of this user manual. The Lotus Notes-based QUADS includes:

- ❑ **QUADS Application.** A Lotus Notes-based application has been designed to capture the workflow of the document review, markup, and revision process. The Lotus Notes engine provides the communication infrastructure to replicate documents to workstations each night. Each workstation will only receive those documents that are relevant to the subject matter expert at that site.

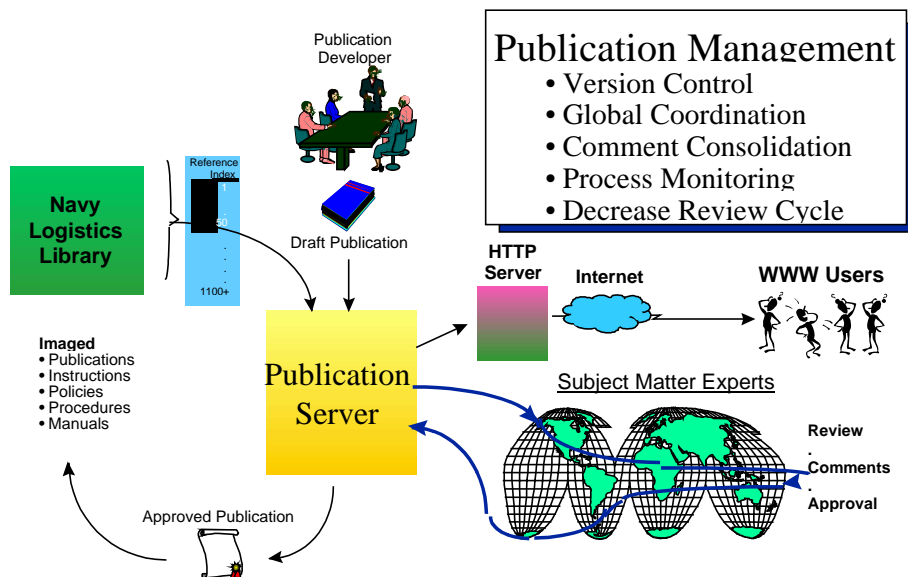


Figure 1.1 Diagram of the QUADS System

How Does the QUADS Suite Work?

The QUADS database is created in an electronic environment, as shown in Figure 1.1, *Diagram of the QUADS System*. A subject matter expert initiates the document development and maintenance process by developing an initial outline of the publication or document to be reviewed, or by using the existing current version. This document is input into the system by the QUADS support team. It is then pushed to the appropriate reviewer workstations for comment and markup. The reviewers are essentially networked into an “electronic document workroom.” After consensus is achieved, the document sponsor forwards the document through the chop chain for approval, signature, and distribution.

Chapter

2

Installation & Support

Installation of the QUADS system consists of installing, configuring, and testing COTS packages; integration of the communication port; and cross certification of the workstation with the publication server. In addition, the workstation initial “workload” is installed.

System Configuration

QUADS is constructed in a Lotus Notes Windows-based application and is designed to work in a standard Personal Computer (PC) environment. The minimum system requirements for QUADS installation are determined by hardware and software requirements.

Hardware Requirements

- ❑ 486/33+ IBM-Compatible PC (Pentium preferred)
- ❑ 3.5” Floppy Disk Drive
- ❑ Dedicated 14.4+ Modem (28/8 preferred)
- ❑ Analog phone line or Internet Connection

Software Requirements

- ❑ 8+ MB RAM (16 MB preferred)
- ❑ 50 MB Hard Disk Space
- ❑ 1 MB Video RAM
- ❑ Windows 3.1 (Windows 95 preferred)
- ❑ Lotus Notes Client or web browser

Setting Up the Desktop

Lotus Notes Installation

The minimum Lotus Notes configuration and a Notes secure User ID are required. If you need help, contact your Lotus Notes Systems Administrator.

Required Notes Setup File

In the Lotus Notes directory “Notes” (located in your assigned hard drive directory, usually c:\), a subdirectory titled “notes\data” should have been created during installation. The local database replica, *navdoc1.nsf*, is stored in this directory. If this is not the case, call the QUADS Help Desk at (800) 362-8237 or (703) 277-6788. QUADS will not properly update without these files in their correct location.

Communications with the Shared Lotus Notes Server

Replication to or from the shared publication server may be accomplished on demand or scheduled uniquely for each site to provide timely updates of each user through an Internet or modem connection.

Adobe Acrobat Reader V3.0 Installation

The Adobe Acrobat Reader (available free from Adobe) is normally setup during the QUADS installation for Lotus Notes. If not available on your desktop, it may be downloaded from the Adobe Homepage at <<http://www.adobe.com>>. Follow the installation instructions on the Adobe Homepage to install the reader program.

QUADS Server Numbers/IP Address

Many QUADS users work on a Lotus Notes server and, therefore, their connection process is automatic. Remote users, or users whose commands do not have access to a Lotus Notes server, will need to connect to the QUADS main server (QUADSMAN/NAVY) using the following number(s) or address. These numbers/address will be incorporated into various publication server connection documents at installation time. However, should it become necessary to re-configure Lotus Notes due to local software changes, these numbers will be needed.

- ❑ **(DSN) 430-8207**
DSN Number (Modem Connection)
- ❑ **(717) 605-8207 or 8208**
Commercial Number (Modem Connection)
- ❑ **204.222.238.17**
Internet Address (TCP/IP Connection Only)



QUADS Support

Various means of support are available to help users with both functional and technical problems.

Systems Help

Questions regarding installation or new user setup, database or specific document access, replicating (database upload/download), system navigation and the like should be addressed to the QUADS Help Desk.

Hours: M-F, 0700-1700 EST

Phone: (800) 362-8237 or (703) 277-6788

Fax: (703) 277-1026

E-Mail: quads@hq.caci.com
--

Functional Area Help

QUADS Project Manager

Name: Jeff Renard

Phone: (703) 277-6608

Fax: (703) 385-3044

E-Mail: jrenard@hq.caci.com
--

Quality Assurance Manager

Name: Kimberly Coffey

Phone: (703) 277-6605

Fax: (703) 385-3044

E-Mail: kcoffey@hq.caci.com
--

Adding the QUADS Icon

If the QUADS icon was not added to your Lotus Notes desktop when the application was installed, a connection document must be added to your personal name and address book. Please contact your Systems Administrator for assistance.

Once the QUADS icon has been added to the Lotus Notes workspace, you are ready to begin working with QUADS.

Chapter 3

Quick Start

This chapter is designed to give users an overview of the QUADS application. A more thorough examination can be found in the remaining chapters of this manual.

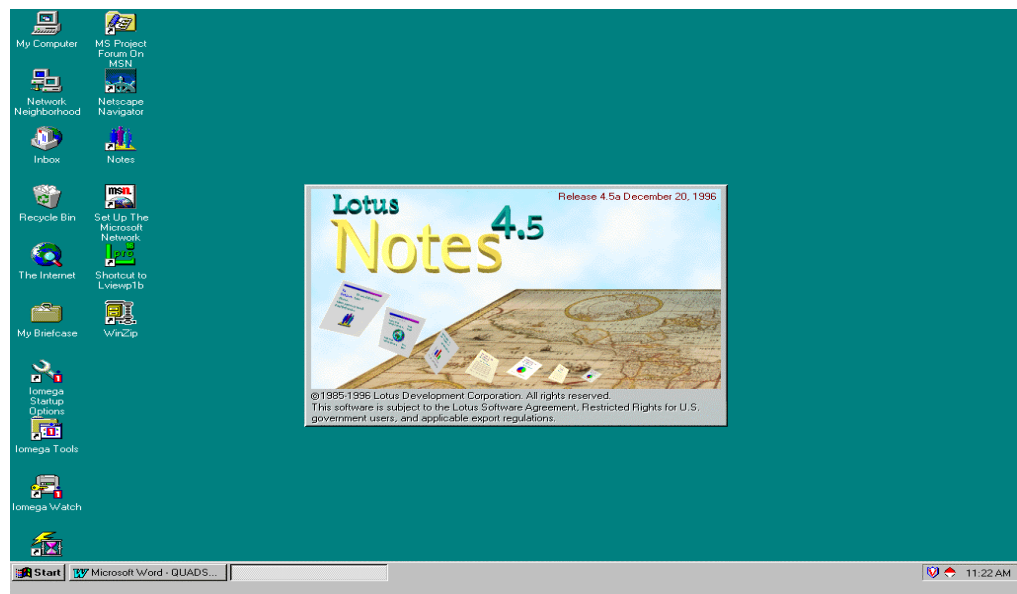


Figure 3.1 Lotus Notes Opening “Splash” Screen



NOTES ICON

Launching the QUADS Database

Double click the Lotus Notes icon from your desktop to launch the application. The Lotus Notes opening “splash” screen, shown in Figure 3.1, will appear while the system is initializing. The splash screen transitions to the Lotus Notes workspace page, as shown in Figure 3.2.

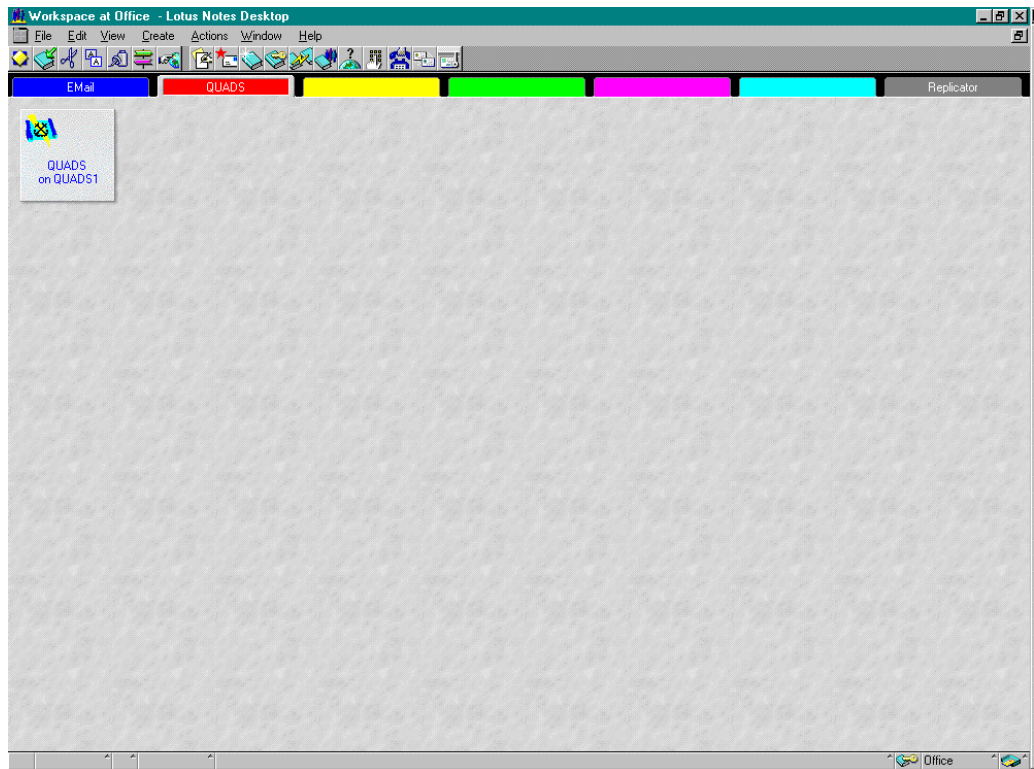


Figure 3.2 Typical Lotus Notes Workspace

To access the database, double click the **QUADS** icon from the workspace. The QUADS opening screen, as shown in Figure 3.3, should appear.



Figure 3.3 QUADS Billboard

Opening Screen - QUADS Billboard

The opening screen in QUADS is the QUADS Billboard. It appears each time that QUADS is opened. Scroll down to review the Items of Interest and System Messages, which are posted to the billboard on a weekly basis. To proceed beyond this screen, simply press the **Open the Database** hotspot below the graphic. The screen will transition to the QUADS Project Summaries Navigator and View.

Project Summaries Navigator & View

Figure 3.4 shows the Project Summaries Navigator and View. QUADS users will automatically be able to see a list of all current QUADS Project Summaries in the “view” on the right half of the screen.

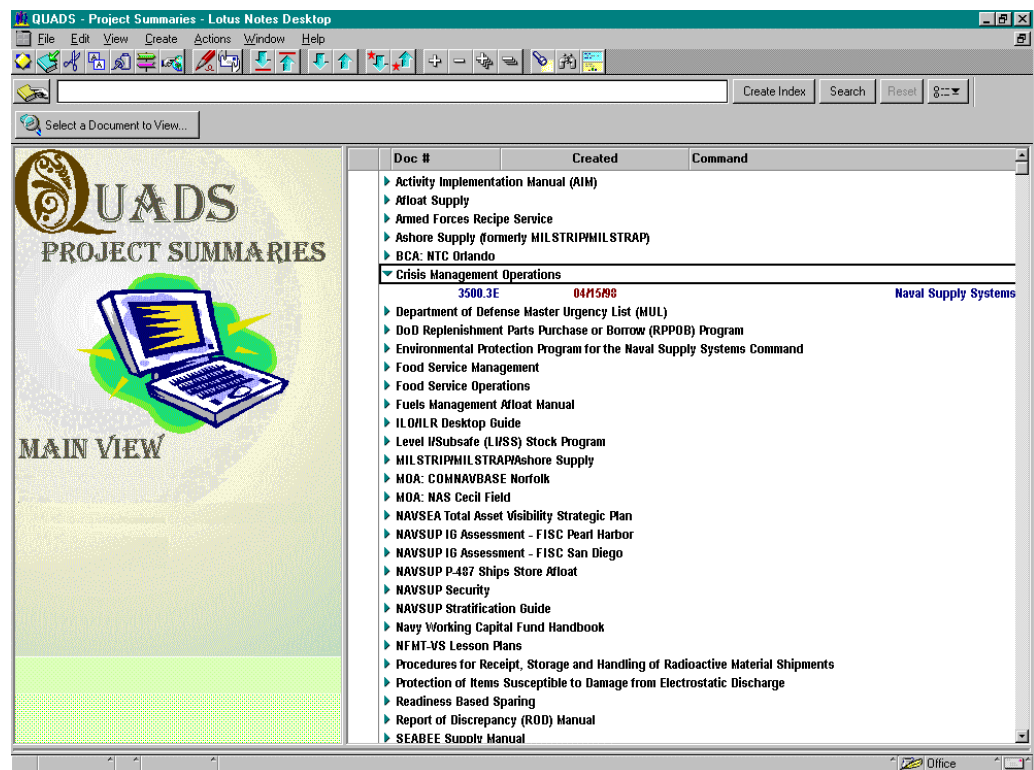


Figure 3.4 Project Summaries Navigator & View

Expanding & Collapsing

Expanding and collapsing are means by which you can, to some extent, control desktop size, appearance, and navigation processes. From the Project Summaries Navigator and View, two methods exist for expanding or collapsing Project Summary titles. The first is to use the arrowheads, commonly known as “twisties.” A single click on a twistie will reveal sub-documents. To subsequently conceal subordinate documents and distill the view to the highest level, simply click the expanded twistie. Another method is to use the Lotus Notes SmartIcons at the top of the screen. Refer to Chapter 4 for further details.

From the Project Summaries Navigator and View, you have two options:

- ☐ View a Project Summary document
- ☐ Navigate directly to the Main View

To view a Project Summary, scroll to the desired Project Summary in the view, highlight it, as shown in Figure 3.5, and double click.

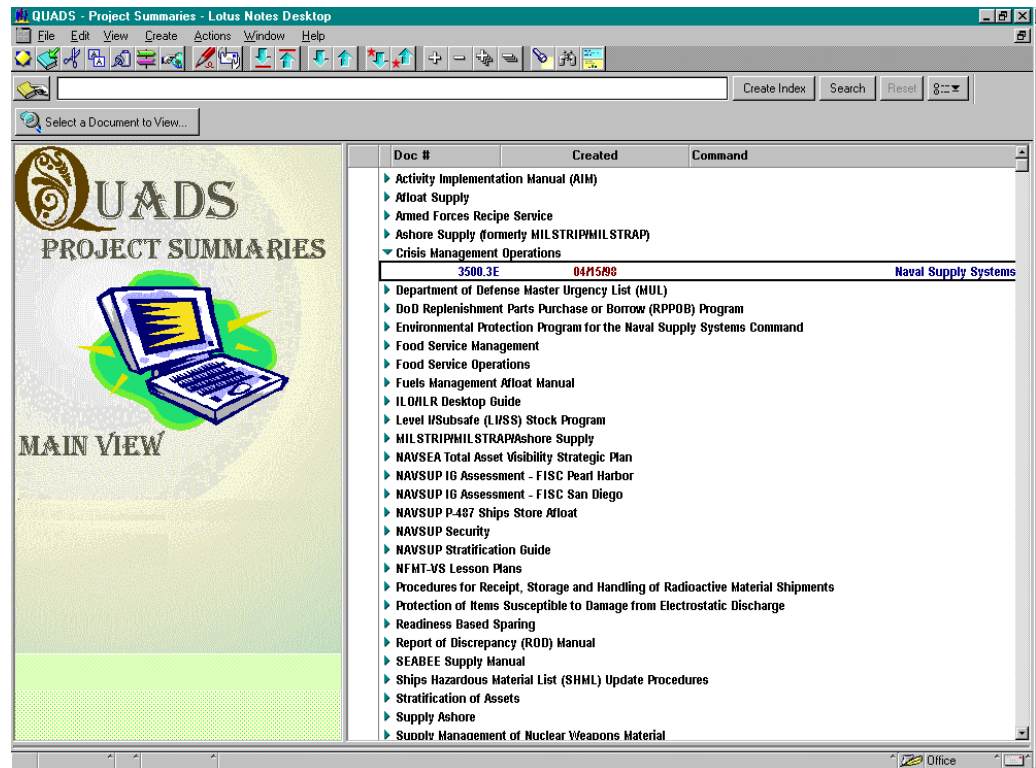


Figure 3.5 Highlighting a Project Summary for View

Viewing a Project Summary

A typical Project Summary document (similar to the one depicted in Figure 3.6) will include information on the project title, originator, document number, point of contact (POC), plan of action & milestones (POA&M), and review team members. Reviewer notes give specific guidance to the review team members from the document sponsor or editor.

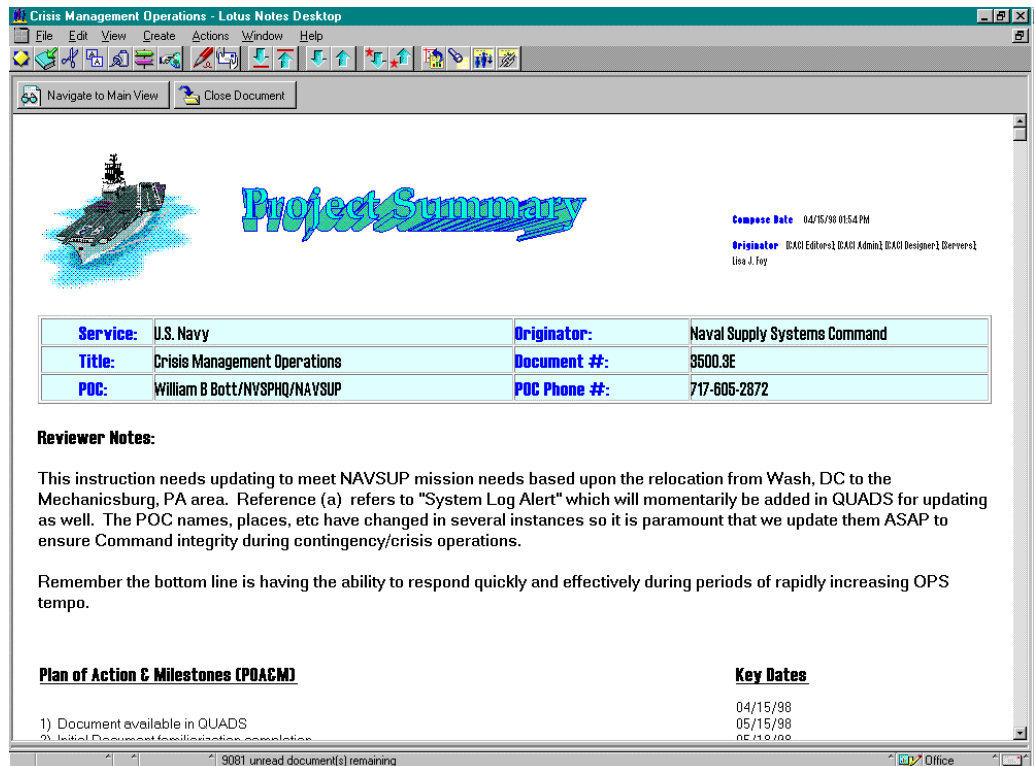


Figure 3.6 Project Summary Document

When finished reviewing the Project Summary, you may either select the **Close Document** button at the top of the screen to return to the Project Summaries Navigator and View, or select the **Navigate to Main View** button to automatically move to the QUADS Main View for this particular project. If the **Navigate to Main View** button is not present at the top of a particular Project Summary document, you are not an authorized reviewer. If interested in becoming a reviewer, refer to Chapter 5 for further details.

Navigating Directly to the Main View

You are not required to view a Project Summary document in order to access the Main View screen. Instead, you may navigate directly to the Main View and skip the Project Summary altogether. To do so, either select the **Select a Document to View** button at the top of the Project Summaries view, shown in Figure 3.7, or select the **Main View** hotspot from the Project Summaries navigation panel.

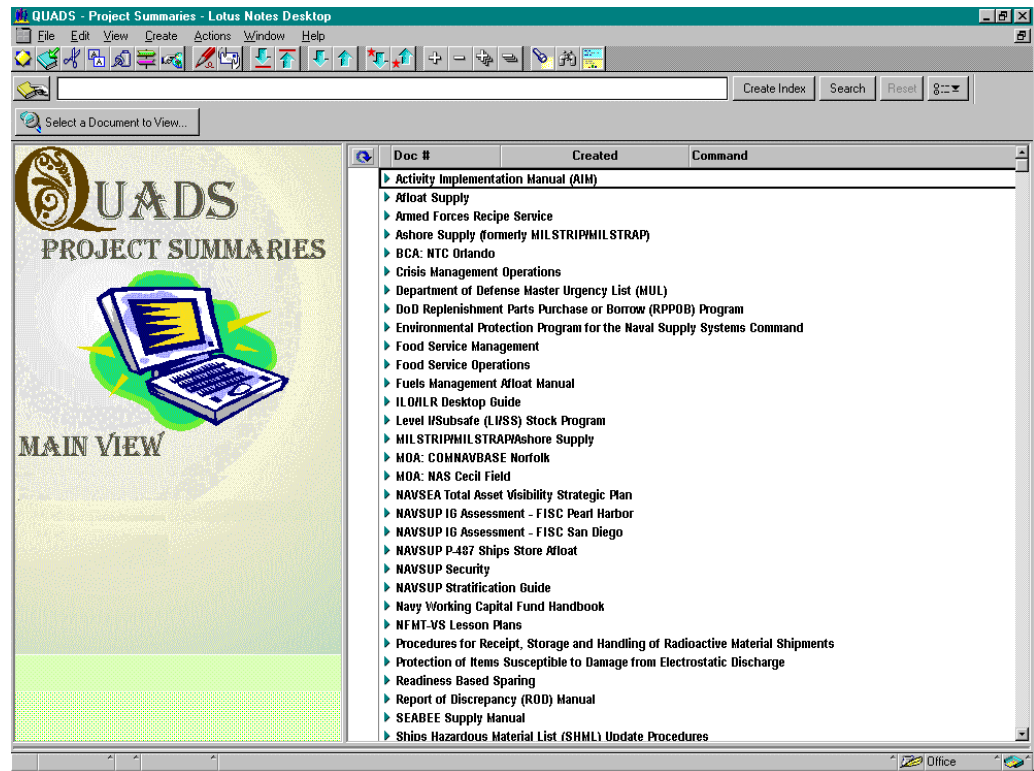


Figure 3.7 Navigating Directly to the Main View

Upon selection, a dialog box will appear. The dialog box lists only those QUADS projects to which you currently have access. Scroll to the desired project title in the dialog box, highlight it, and click **OK**. The screen will navigate directly to the Main View for the selected project.

Main Navigator & View

Looking at a diagram of the Main View in Figure 3.8, you will see the navigation panel to the left, the project outline to the right, and the search bar situated across the top. Refer to Chapter 4 for a detailed explanation of Lotus Notes search bar features. To look at any document listed in the view, highlight any line in the outline, as shown in Figure 3.8, and double click. A typical QUADS document, like the one in Figure 3.9, will appear.

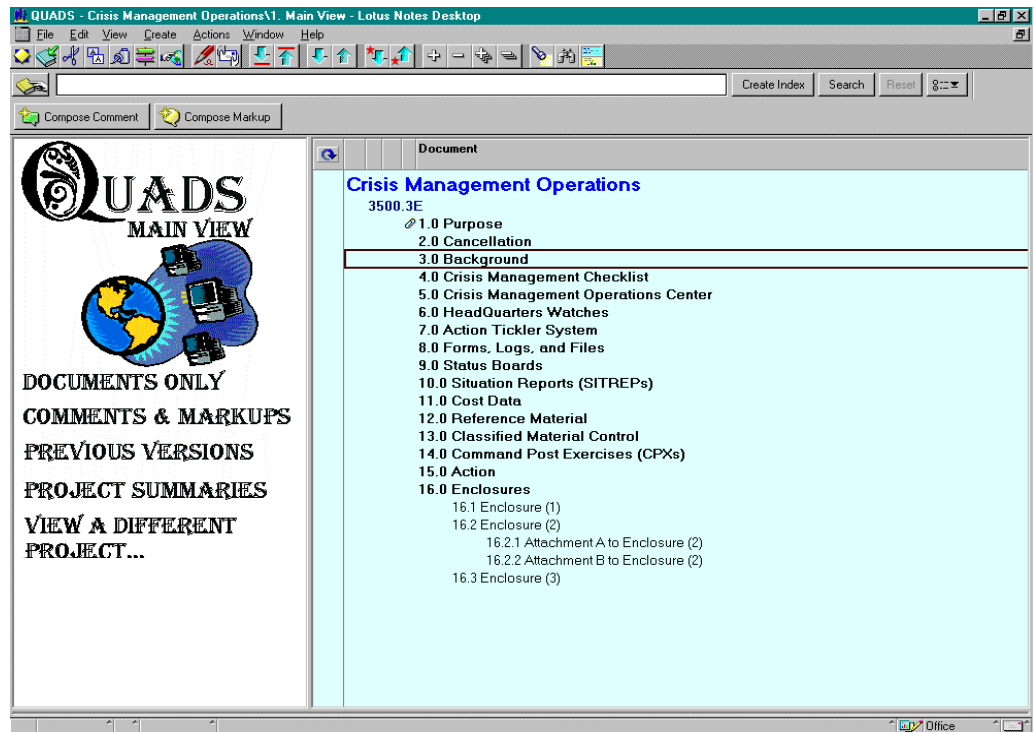


Figure 3.8 Highlighting a Document for View

Viewing QUADS Documents

After opening a document section, you will be able to see the text in paragraph form, as shown in Figure 3.9. In some cases, revisions are highlighted with text properties (e.g., color, underline, bold, italics) to indicate where changes have been made from a previous version of the document. Each document section view is designed to be no more than 1 to 2 pages in length. Most, in fact, are smaller to give the reviewers and the editor making revisions to the document a clear, concise idea of the specific text against which reviewer comments or markup requests apply. To create a comment or a markup request, select the **Compose Comment** or the **Compose Markup** button respectively.

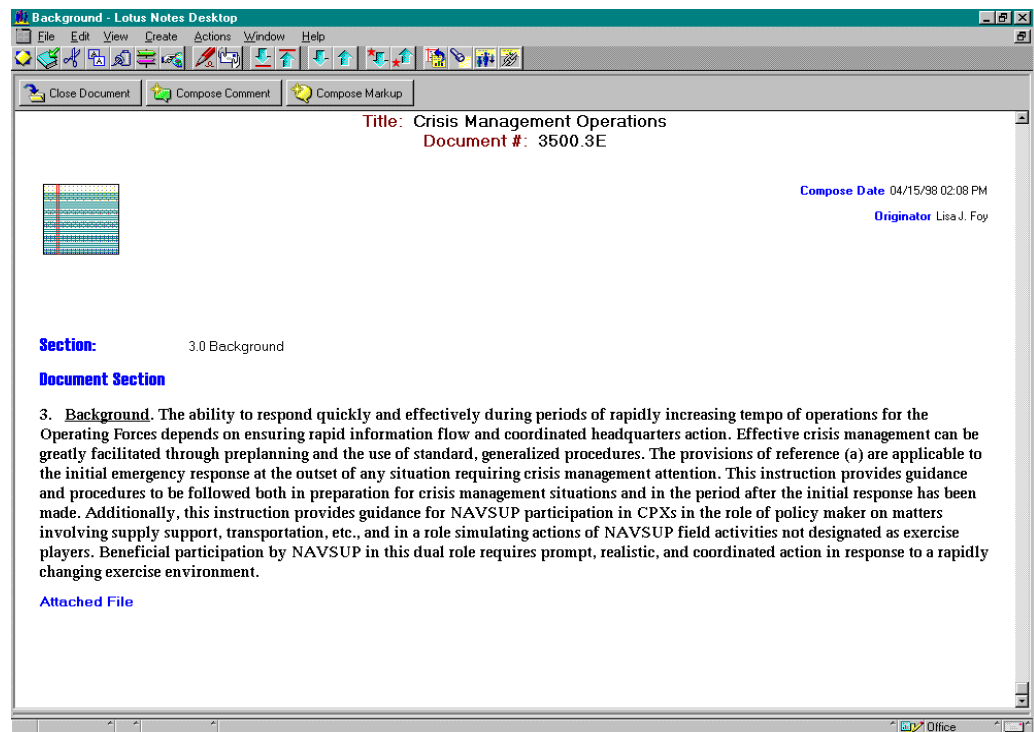
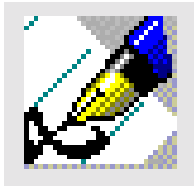


Figure 3.9 Typical QUADS Document

Note:

In the Lotus Notes structure, each section of a publication is considered a “document.” This should not be misconstrued as a separate publication or instruction. Each QUADS project is divided into many documents.

The Process of Review



Markup requests and comments are the methods by which a reviewer provides specific input to the document editor using the QUADS system. With QUADS, electronic comments and markups can be added at any time.

Note:

Markup requests are the QUADS approach to the traditional “redline.” In contrast, comments allow users to pose questions, add information, or another perspective.

Markup Requests

To compose a markup request, you have two options:

- ❑ Select the **Compose Markup** button from the top of the document to which the request applies.
- ❑ Select the **Compose Markup** button at the top of the Main View while highlighting the desired document.

The Markup form, as shown in Figure 3.10, opens in Edit Mode as evidenced by the brackets [] which appear throughout the form. Edit mode allows you to enter data in the designated fields of the form.

Figure 3.10 Markup Creation/Editing Screen

Files may be attached and submitted with a markup request. To submit the markup request, select the **Close Document** button at the top of the document. Click **Yes** on the dialog box to save and submit the markup. The project editor has the responsibility to provide feedback to the reviewer as to the disposition of input.

Comments

To compose a comment, you have two options:

- ❑ Select the **Compose Comment** button from the top of the document, comment, or markup to which the comment applies.
- ❑ Select the **Compose Comment** button at the top of the Main View while highlighting the desired document, comment, or markup.

The Comment form, as shown in Figure 3.11, opens in Edit Mode as evidenced by the brackets [] which appear throughout the form. Edit mode allows you to enter data in the designated fields of the form.

Figure 3.11 Comment Creation/Editing Screen

Files may be attached and submitted with a comment. To submit the comment, select the **Close Document** button at the top of the document. Click **Yes** on the dialog box to save and submit the comment. Refer to Chapter 5 for a more detailed explanation regarding comments and markup requests.

Chapter

4

Features of Lotus Notes

The user interface for the review process is a Lotus Notes (Release 4.0 or higher) desktop that incorporates the document functionality that you will need in the QUADS database.

Lotus Notes Workspace

The Lotus Notes Workspace, shown in Figure 4.1, is the window Notes displays when you open Lotus Notes. The workspace consists of the menu bar, several tabs with various database icons on each tab, the status bar, and the SmartIcon toolbar. You can organize sets of related database icons on different tabbed pages in the workspace, and give each page a descriptive name. The last page is automatically occupied by the Replicator, which allows you to manage replication activities. You cannot rename the Replicator page.

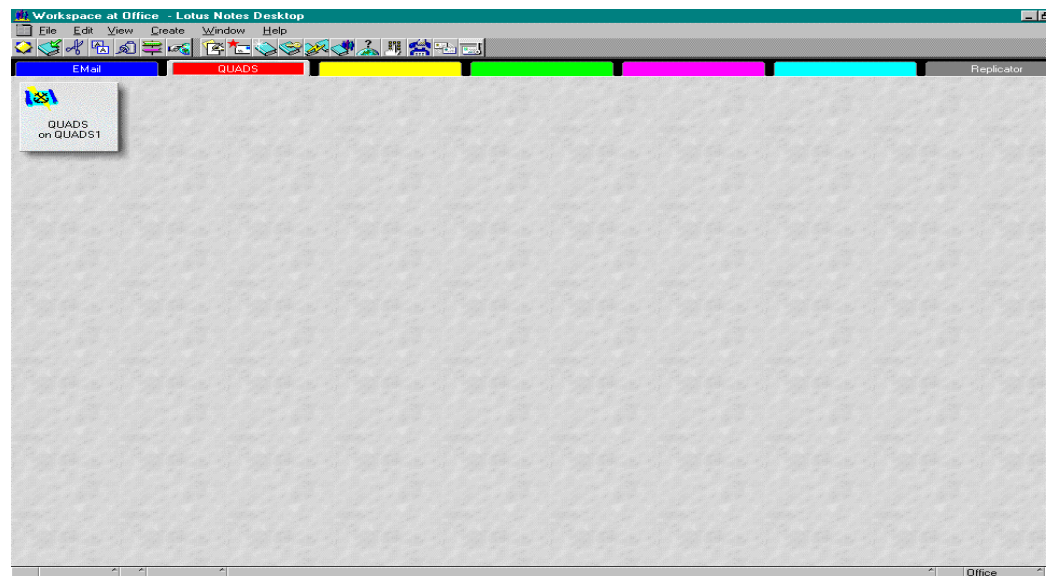


Figure 4.1 *Lotus Notes Workspace*

SmartIcons

While working in Lotus Notes, you have access to the standard Lotus Notes Universal SmartIcon set. These are icons at the top of the Lotus Notes workspace that, when pressed, will execute common file menu commands. For many tasks, it is simpler to click SmartIcons than to pull down menus or recall and type keyboard shortcuts. The SmartIcons are “context - sensitive,” meaning they change according to where you are in the database to allow for the common functionality most often required in that part of the database. Figure 4.2 illustrates the Universal SmartIcon set. A complete list of icons follows.

Note:

When you hold the mouse pointer over the SmartIcons, Lotus Notes displays a brief description of the icon. You can hide or display these descriptions by choosing **File | Tools | SmartIcons** from the menu bar. In the resulting dialog box under Show, select or deselect Descriptions. Click **OK**.



Figure 4.2 Lotus Notes Universal SmartIcon Set



Properties. Displays the properties such as file size, indices of documents or databases.



File Save. Saves the current object.



Cut, Copy, and Paste. “Cut” removes the currently selected text/object and places it on the clipboard. “Copy” copies the currently selected text/object and places it on the clipboard. “Paste” copies the text/object from the clipboard to the current cursor position or over the currently selected text/object.



Help Guide Me. Calls up the Help section of Lotus Notes.



Actions Edit Document. Places the currently selected document in “Edit Mode.”



Actions Forward. Forwards a mail memo.



Navigate Next Main. Will navigate to the next document at the highest level of the document hierarchy.



Navigate Previous Main. Will navigate to the previous document at the highest level of the document hierarchy.



Navigate Next Document. Will navigate to the next sequential document.



Navigate Previous Document. Will navigate to the previous sequential document.



Navigate Next Unread. Will select and navigate to the next unread (not previously viewed) document.



Navigate Previous Unread. Will select and navigate to the previous sequential unread (not previously viewed) document.



View Expand. In outline view, will expand the subordinate documents for the selected document.



View Expand All. In outline view, will expand all subordinate documents in the view regardless of selection of any particular documents.



View Collapse. In outline view, will remove view of subordinate documents and show only the superior document with a “twistie,” indicating that subordinate documents are available.



View Collapse All. In outline view, will distill the view to the top level only with “twisties” to indicate subordinate documents are available.



Edit Find/Replace. Allows the classic text search with replacement of the designated text.



View Show/Hide Search Bar. Toggles from the outline view with the search bar to the outline view without the search bar (For the search bar to be useful, the database must be full text indexed).



View Show/Hide Preview Pane. Toggles from the outline view with a selected document “tiled” to the outline view without the selected document “tiled.”

Printing

Printing of documents in QUADS is accomplished at the Lotus Notes view level. To print one document, simply highlight the document title in the view. To print multiple documents, click in the column to the far-left of each document title. This toggles a checkmark “on,” as shown in Figure 4.3. To deselect a previously selected document, simply click on the checkmark. This will toggle “off” the selection.

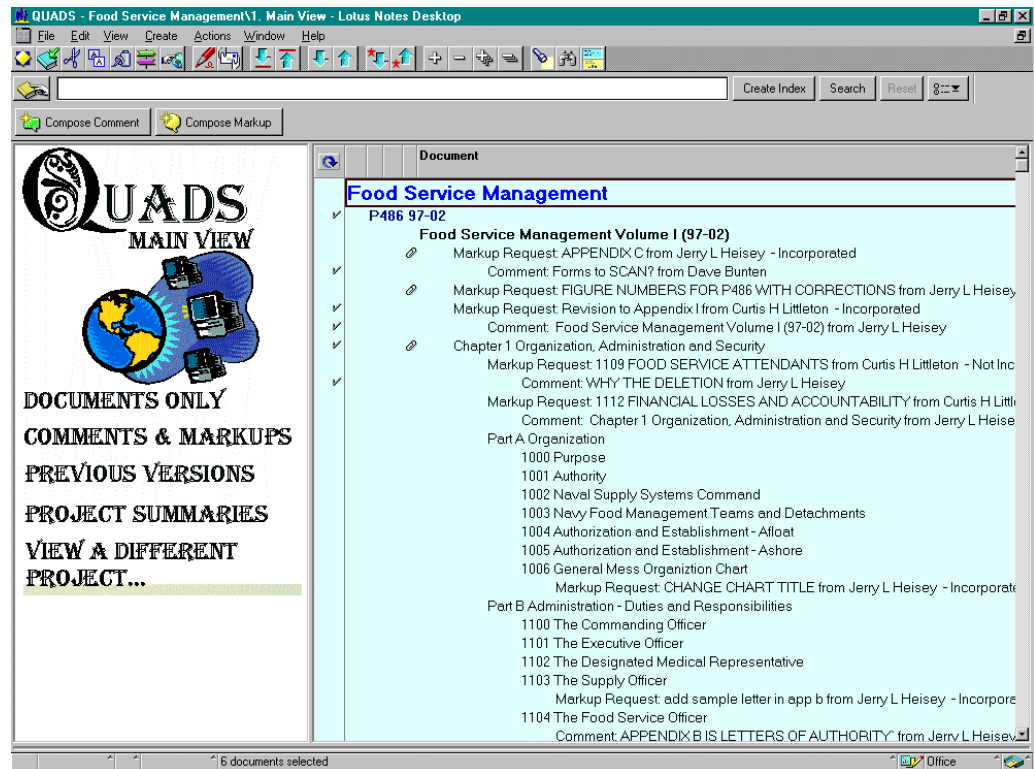


Figure 4.3 Printing Multiple Documents

Choose **File** | **Print** from the File dropdown menu. The Print dialog box will appear. Ensure that the “Print Selected Documents” radio button has been pressed. To submit the print job, click **OK** and the document(s) will be printed.

Note:

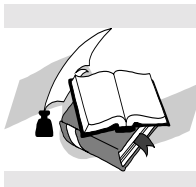
A single open document may also be printed using the above procedure; however, *only* the open document will be printed.

You may also print the project outline shown in the view. To do so, choose **File** | **Print** from the dropdown menu; be sure the “Print View” radio button is selected in the resulting dialog box. Select **OK** to submit the print job.

Searching

Searching for text, documents, or field values is a powerful feature of many database engines. QUADS is no exception to this, offering the distinct advantage of conducting an automated search for items of interest with the on-line search engine.

Full Text Search



QUADS contains a full text search engine that allows you to find instances of an item across the spectrum of documents in the database. For instance, finding a specific section in a manual might be a daunting task, involving searches through three or four major views. With the full text search feature in Lotus Notes, this would take less than a minute.

Enter Search
Criteria Here

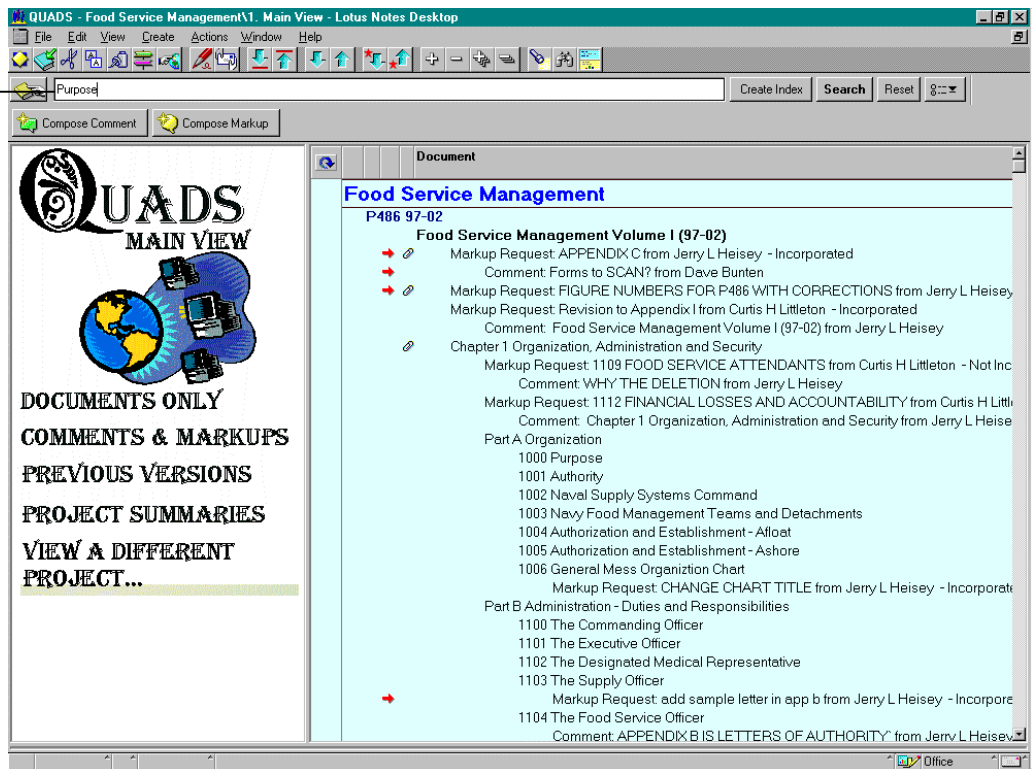


Figure 4.4 Full Text Search

To initiate a search from a particular view, enter the search criteria in the search bar, as depicted in Figure 4.4. If the search bar is not visible, click the **View Show/Hide Search Bar** SmartIcon, or use the **View | Search Bar** dropdown menu. To begin the search, select the **Search** button.

Search results, shown in Figure 4.5, are listed in relevancy ranking order, from the document that is most relevant (i.e. that has the most occurrences of the search text) down to the one that is least relevant, in descending order. To view any one of these resulting documents, simply double click its title. To restore the original view, click the **Reset** button.

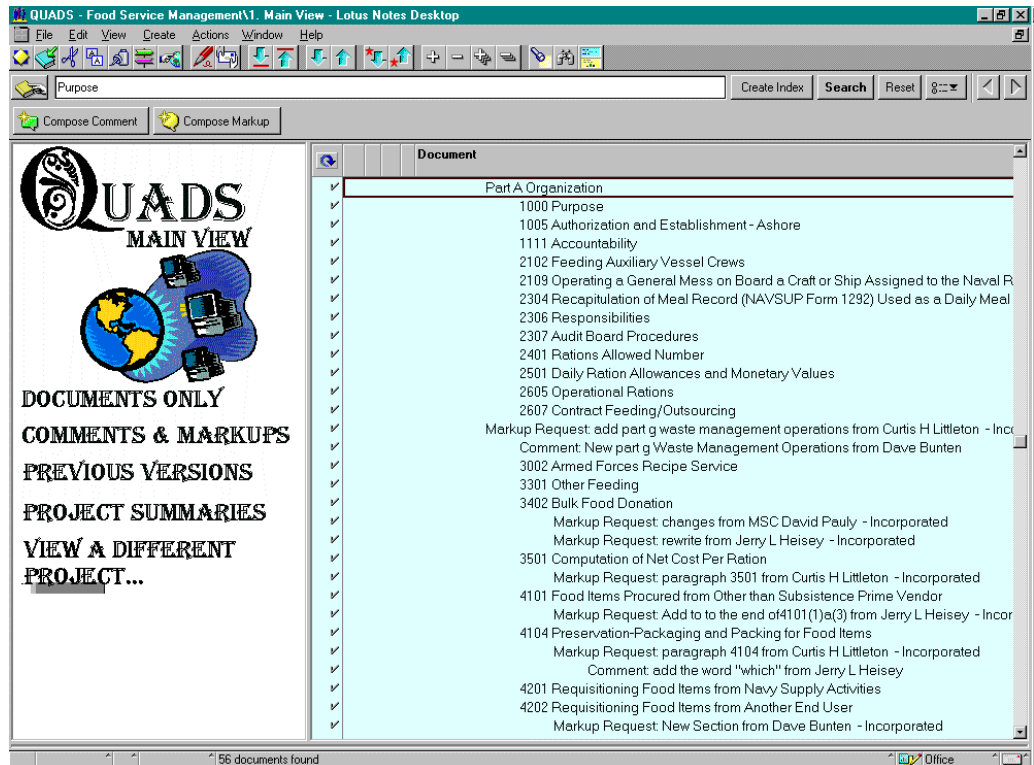
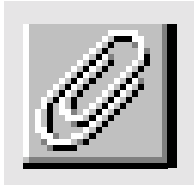


Figure 4.5 Results of Full Text Search

Classic Text Search

You also have the ability to perform a classic text search by using the Lotus Notes **Edit Find/Replace** SmartIcon. Open the desired document and click **Edit Find/Replace**. When the dialog box appears, enter the desired text in the field provided and select "Find Next." The screen will scroll to and highlight the first occurrence of the text in the current document. Repetitively clicking "Find Next" will navigate to the remaining occurrences until no more are found. You will not have access to the "Replace" function for control purposes. The document editors, however, may use this function.

Attaching & Detaching Files



Some documents in QUADS will have attached source files. These are generally the Microsoft Word files that were used to create the Lotus Notes documents and views. These are typically the documents to which the editor will apply reviewers' markup requests and comments.

Attached
File

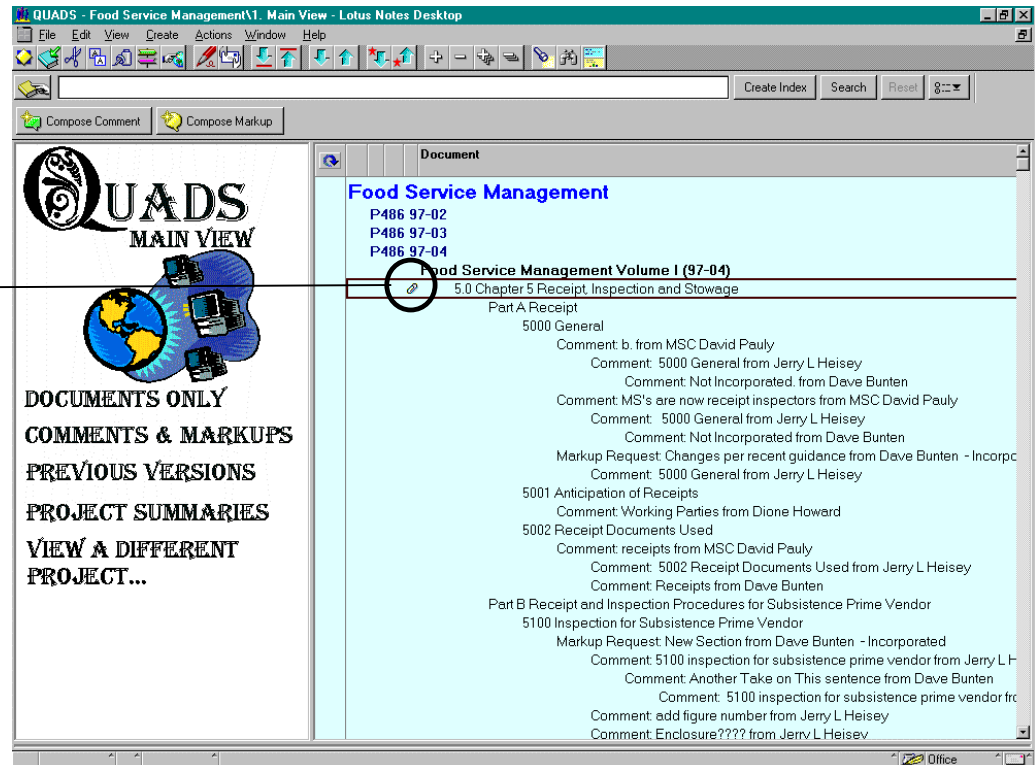


Figure 4.6 Outline View Showing Attached File

In outline view, documents with attached files will appear with a “paperclip” next to their titles, as shown in Figure 4.6. This paperclip makes it easy to spot documents, comments, or markup requests that contain attached files.

Each chapter or major division in a particular publication will have the associated MS Word document(s) shown as an MS Word icon(s) at the *very bottom* of the section. One such icon is depicted in Figure 4.7. Attached source files are useful for seeing and printing the formatting of the original document.

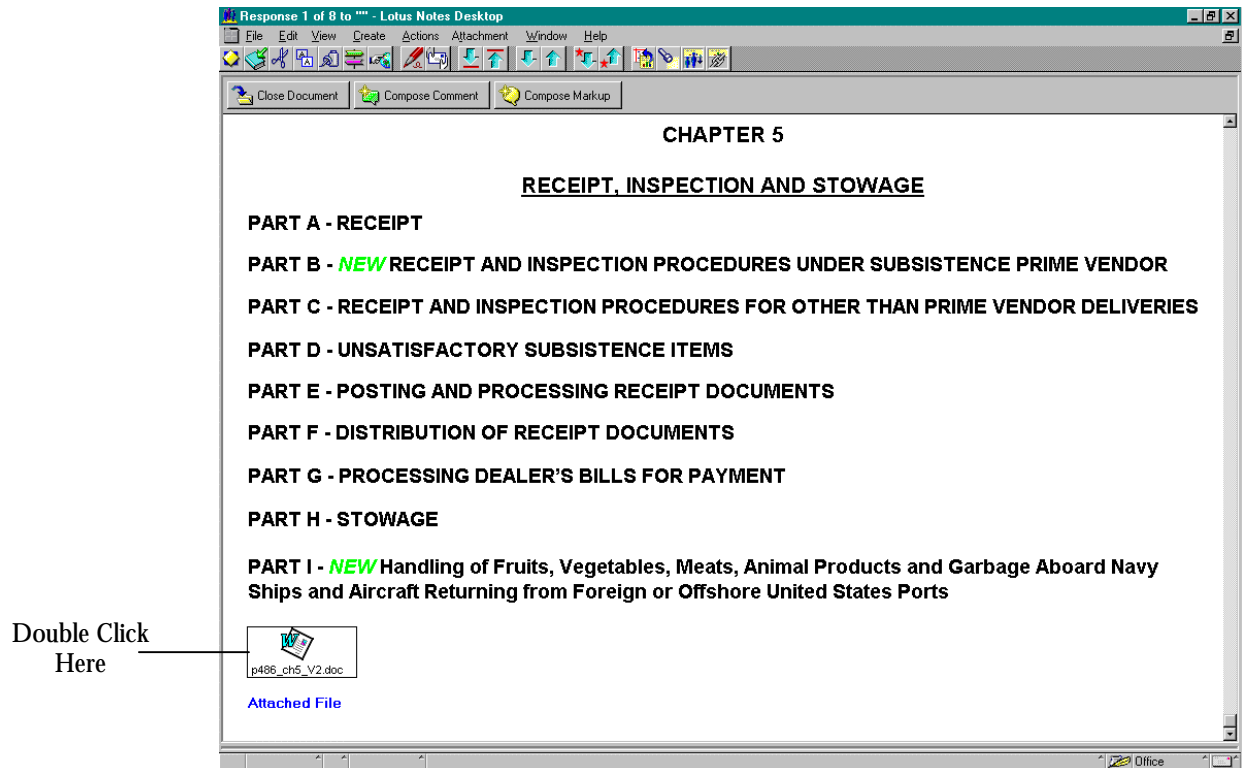


Figure 4.7 Document with Attached File

Double clicking the MS Word icon will bring up a dialog box, shown at Figure 4.8, prompting you to choose from among the following options:

- ❑ **View** . If you do not have the native text editor application (Microsoft Word or the like), you may view it in the Lotus Notes Universal Viewer.
- ❑ **Launch**. You may launch the attached file(s) in the native word processing application.
- ❑ **Detach**. You may save the file(s) to the local hard drive.

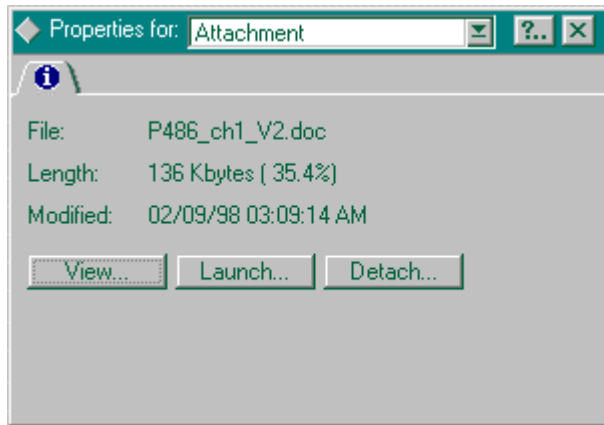


Figure 4.8 Attachments Dialog Box

In the universal file viewer, the file may be viewed and the text may be copied to the clipboard to be used with whatever word-processing application you may have. *Hence, there is no need for you to have the native word processing application of the source document.*

Detaching Files

You may **Detach** (really a misnomer - one actually saves it to the hard drive) an attachment. Click the MS Word icon at the bottom of the screen. When the dialog box appears, select the **Detach** option. Another dialog box prompts you to specify where on your hard drive to save the attachment. The file name of the attachment appears in the File Name field once you have selected it. Click the **Detach** button to save the file to the hard drive. The file can subsequently be viewed in its native application.

Attaching Files

Files may be attached to comments or markup requests. Whether you are attaching a file to a comment or to a markup request, the process is virtually the same. To attach a file to a markup, you first must place the mouse cursor in the brackets beneath the Markup Description section of the editing form. Choose **File | Attach** from the dropdown menu, as shown in Figure 4.9.

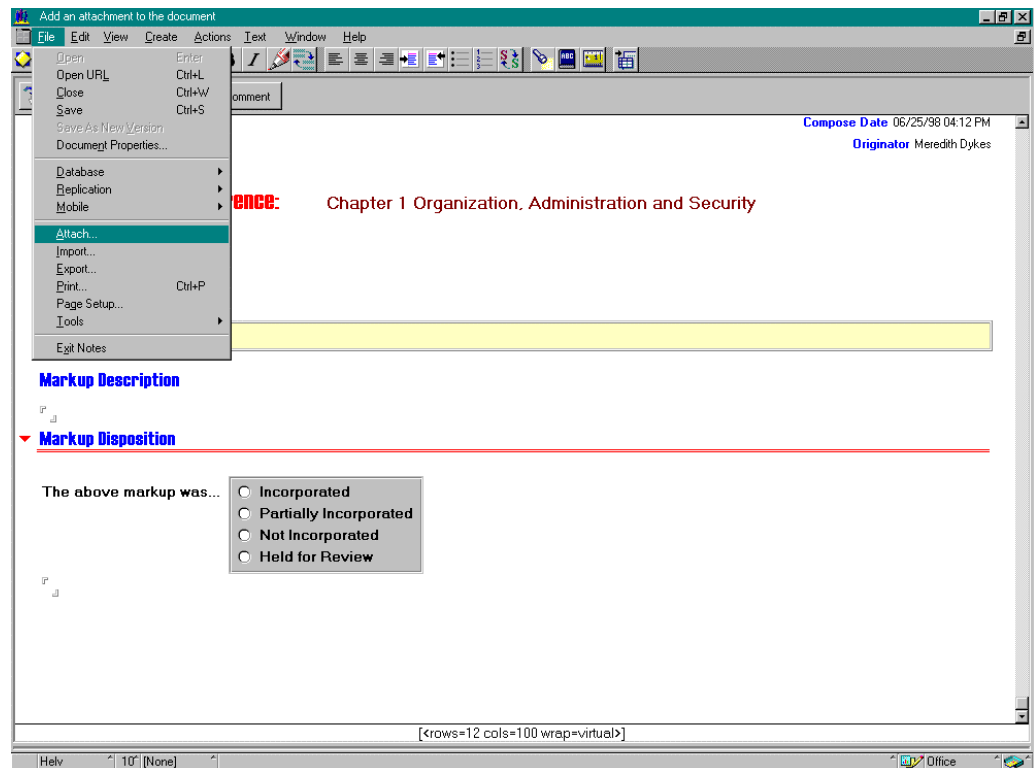


Figure 4.9 Attaching a File To a Markup Request

A dialog box will appear, allowing you to browse your hard drive to locate the file you wish to attach. Highlight the file and the file name will appear in the field at the bottom of the box. When finished, select the **Create** button. The Microsoft Word (or other application) icon will appear in the body of the markup editing screen.

NON SERVER-BASED USERS ONLY

The Replication Process

To navigate views and open documents is valuable in the document review process only if you can see the updates that are made and provide feedback. To do this, non server-based users must *replicate* - a process of downloading and uploading files from the central server. In the Lotus Notes client-server topology, any client may provide updates to the server, but in limited fashion depending on the degree of access. While only the database administrators may change the documents themselves (for reasons of configuration control), all reviewers have the ability to send comments and markup requests.

Note:

Non server-based users are remote users that are not connected to a Lotus Notes server. When a non server-based user accesses the Lotus Notes workspace, the **QUADS** icon will read "QUADS on Local." Server-based users, on the other hand, are directly connected to a Lotus Notes server. A server-based user's **QUADS** icon will appear similar to the one shown in Figure 4.10, with the Lotus Notes server indicated. In this case, the server is "QUADS1." Server-based users do not need to replicate, as their replication process is automatic.

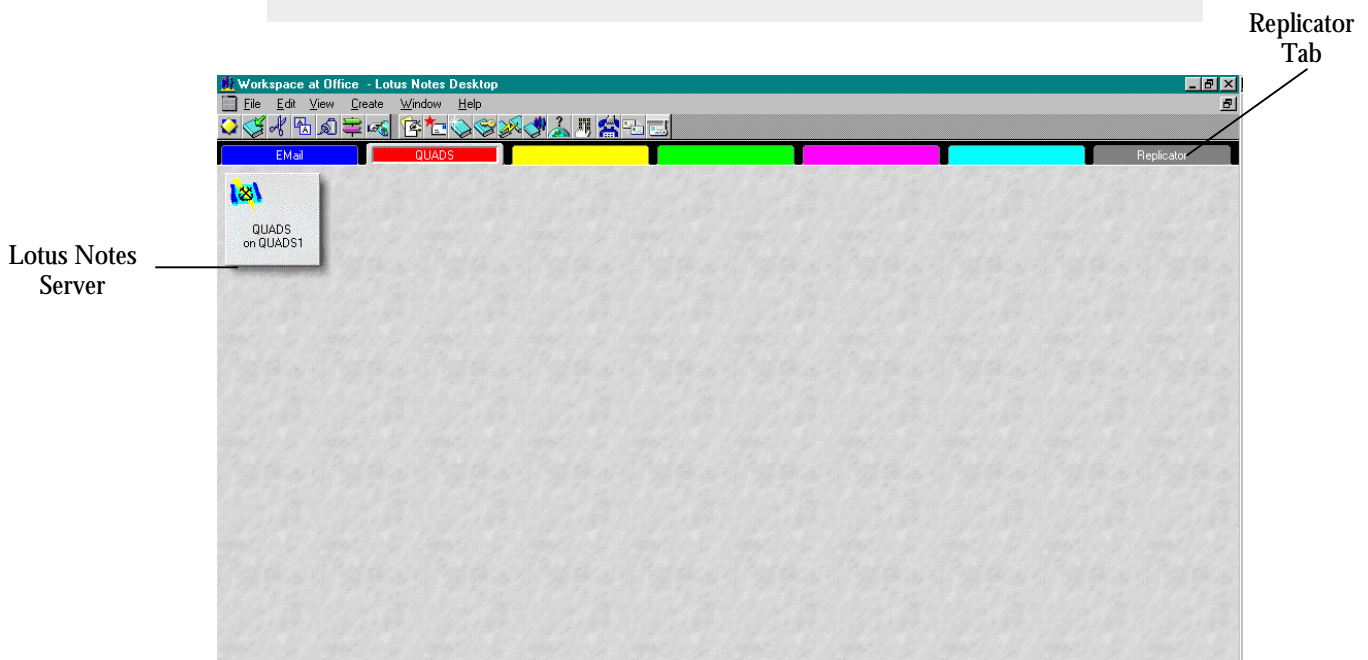


Figure 4.10 *QUADS Icon and Replicator Tab on Lotus Notes Workspace*

Replication Set Up

The replicator page is shown at Figure 4.11. The database icon for QUADS should already be available as a selection on this page. If it is not, simply click the QUADS database icon and “drag” it to the replicator page tab. The QUADS icon should have a double-headed blue arrow, indicating both send and receive mode in the “Other Actions” column. The box in the “Start” column to the left of the QUADS icon should also be checked.

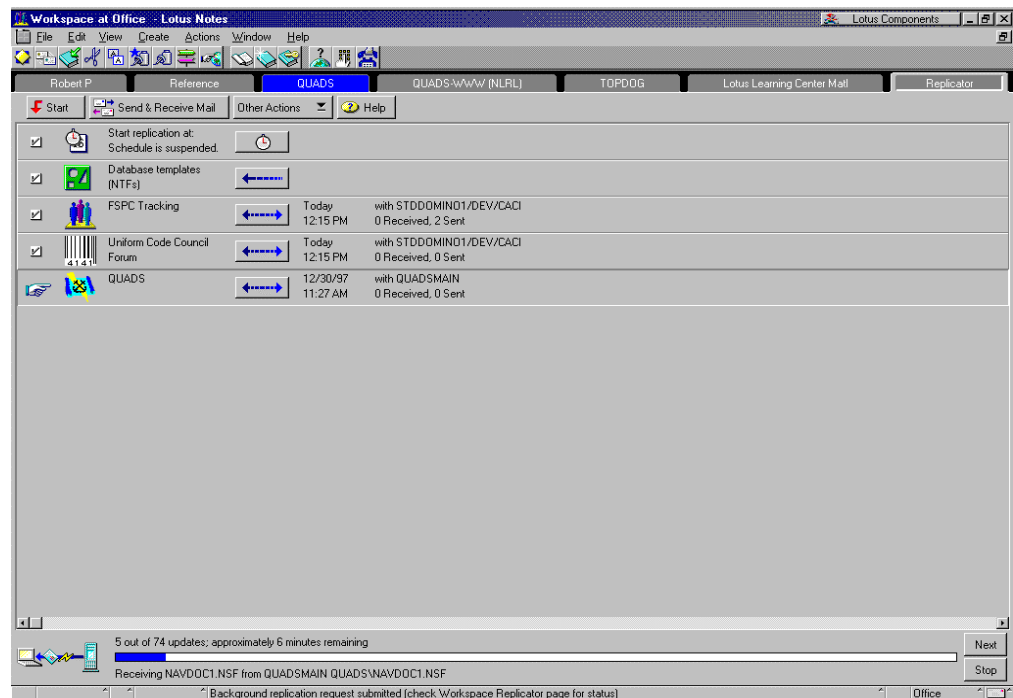


Figure 4.11 Replicator Page

If you are set up for scheduled replication with the QUADSMAN/NAVY server, the clock icon will be checked and an indication will be visible in the remarks column that this is for QUADS.

To ensure that the QUADSMAN/NAVY server is given priority among Notes servers to replicate the QUADS database, double click the blue arrow in the row hosting the QUADS icon. A dialog box will appear as shown in Figure 4.12. Ensure that the server box has QUADSMAN/NAVY selected. For the QUADS icon, both the send and receive boxes should be checked.

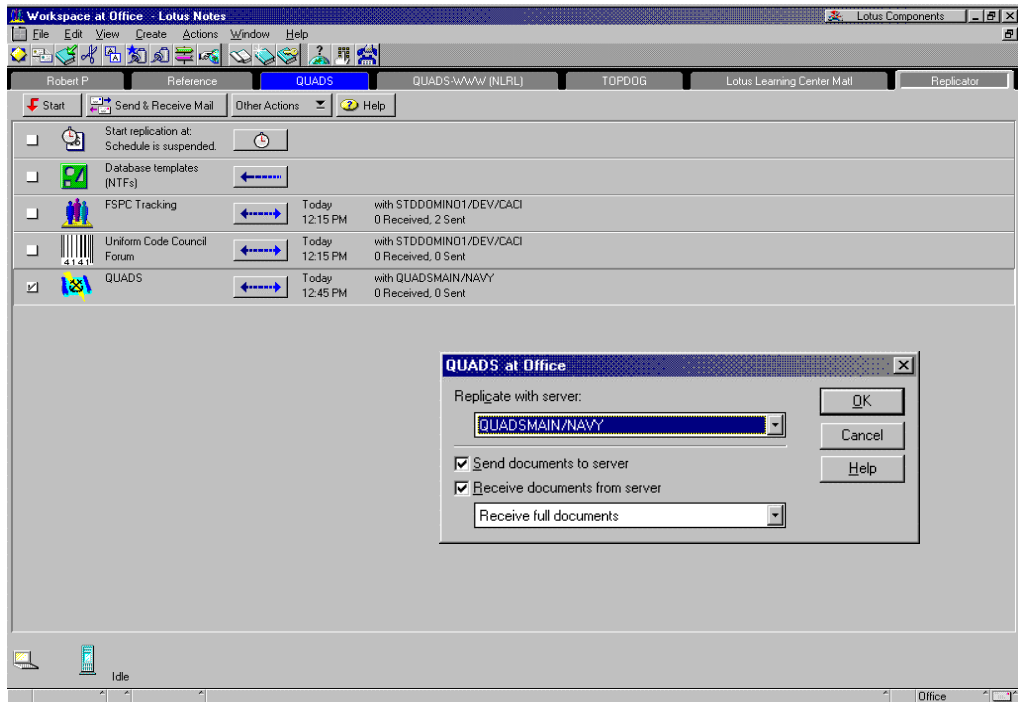


Figure 4.12 Selecting QUADSMAN as Priority Server

Methods of Replication

To begin the replication process, single click the replicator tab on the Lotus Notes workspace. Clicking the replicator tab will bring you to the replicator page, as shown in Figure 4.13. To initiate on-demand replication, click the **Start** button in the upper left corner of the replicator page. A message will appear in the bottom left corner of the Lotus Notes workspace indicating that the computer is attempting to connect to the QUADSMAN/NAVY server. After connection, a comparison of the local QUADS database to the QUADSMAN/NAVY server's master copy will occur. This is a differential process ensuring that you get only those documents that you need.

Start Button

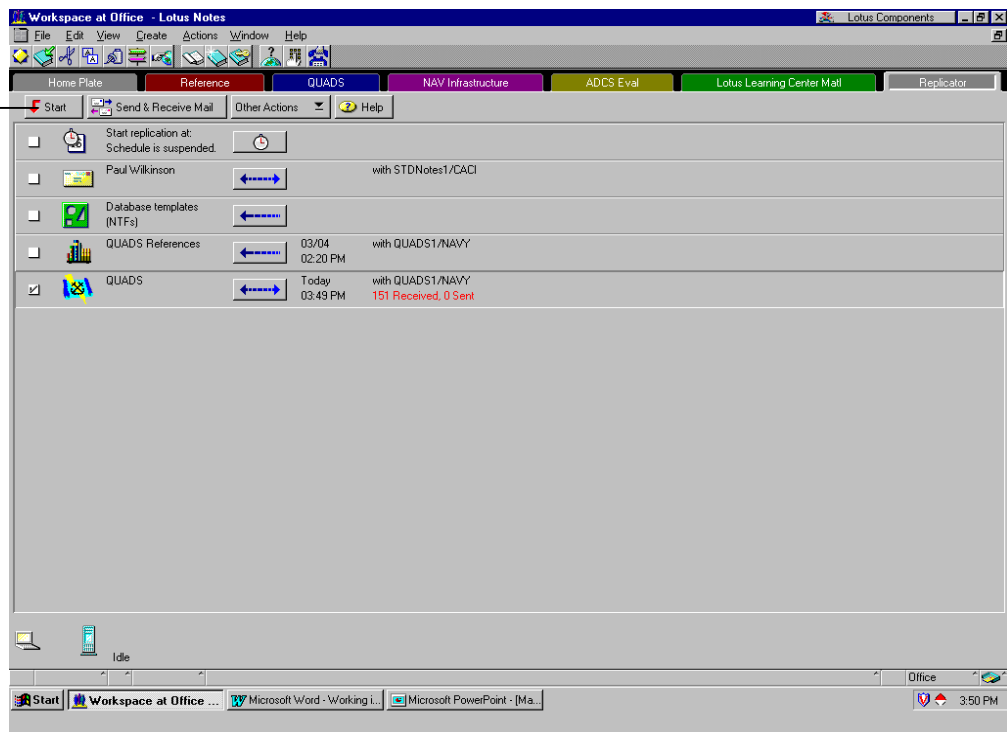


Figure 4.13 Replicator Page

A blue progress bar at the bottom of the replicator page indicates the status of the document download and upload. It will first perform a search of the server for design changes. Next, it will give both number of documents replicated of the total documents in the database and the estimated time remaining for replication. An example of this comparison is shown in Figure 4.14.

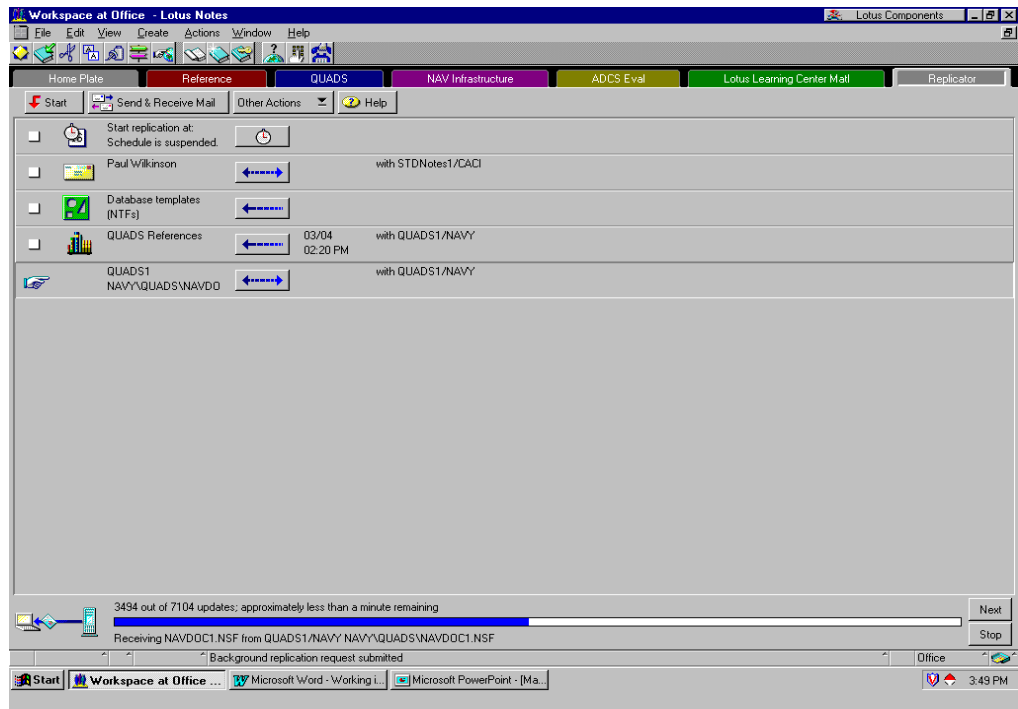


Figure 4.14 Status Bar Showing Replication Progress

Replication will continue until all documents are successfully downloaded, or until interrupted by the user. If replication is interrupted, a message such as “Failed with server QUADSMAN/NAVY, 151 documents received, 5 sent” will appear to the side of the icon. This is not a cause for concern and only indicates that the process was halted. Further investigation is needed only if you did not choose to stop the replication, and a similar message was received.

An alternative method of replicating is to click the “Other Actions” box itself and choose “Replicate selected database,” as shown in Figure 4.15.

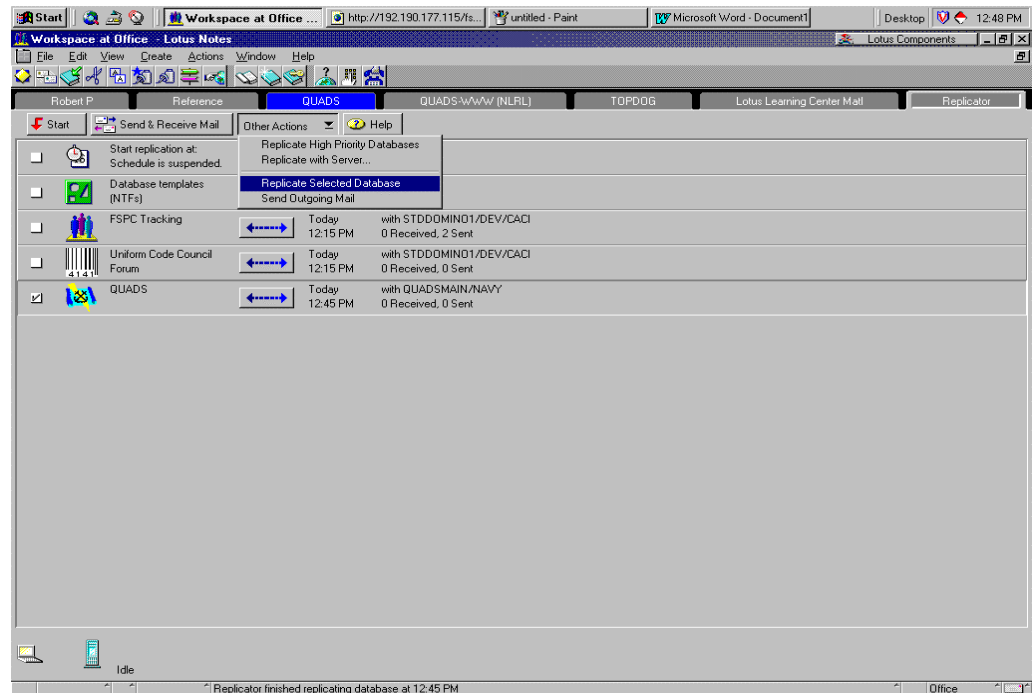


Figure 4.15 Alternate Method of Replication

If the replication parameters are not set up or you need extra help, contact the QUADS Help Desk at (800) 362-8237 or (703) 277-6788.

Chapter 5

Working in QUADS

Before working with QUADS, you should become familiar with Lotus Notes[®] terminology and navigation techniques. If you are unfamiliar with Lotus Notes basics, refer to Chapter 4 for some very basic information about Lotus Notes.



NOTES ICON

Accessing the Lotus Notes Workspace

Double click the Lotus Notes icon from your desktop to launch the application. The Lotus Notes opening, or “splash” screen, shown in Figure 5.1, will appear while the system is initializing. The splash screen transitions to the Lotus Notes workspace page. A typical workspace setup is shown in Figure 5.2.

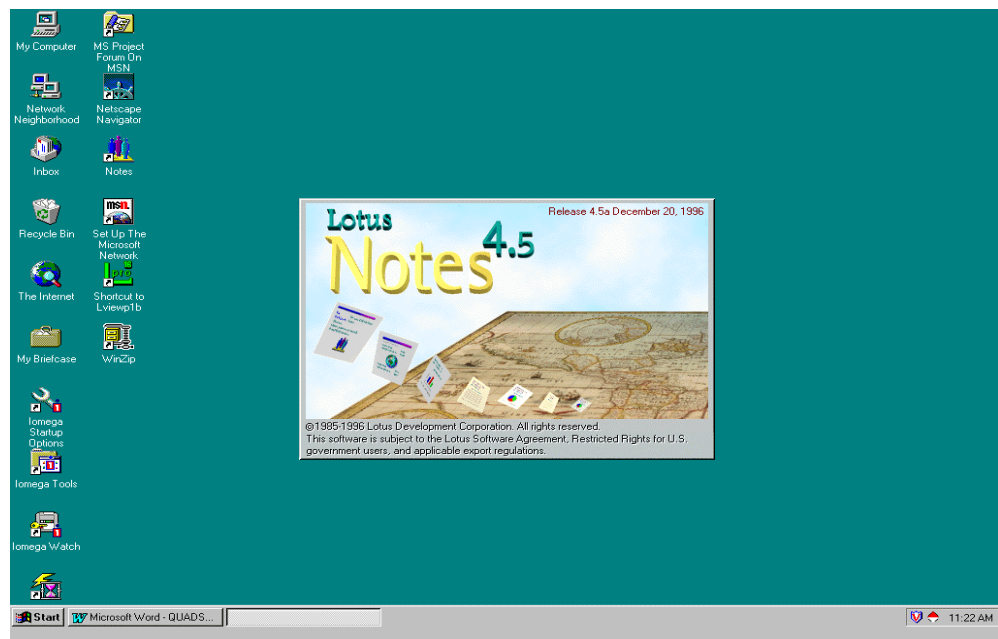


Figure 5.1 Lotus Notes Opening “Splash” Screen

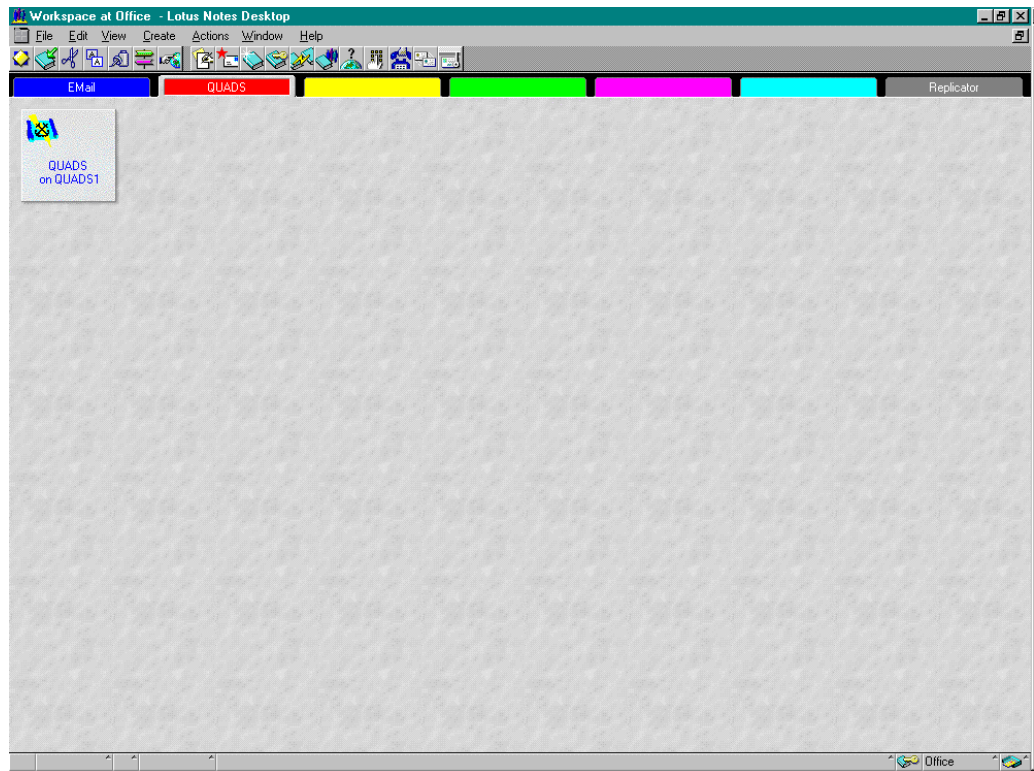


Figure 5.2 Typical Lotus Notes Workspace

Double click the **QUADS** icon from the workspace to access the QUADS database. The screen will now transition to the QUADS Opening Screen.

Opening Screen - QUADS Billboard

The opening screen in QUADS is the QUADS Billboard, depicted in Figure 5.3. It appears each time QUADS is opened. Scroll down to review the Items of Interest and System Messages, which are posted to the billboard on a weekly basis. To proceed beyond this screen, simply press the **Open the Database** hotspot below the graphic. The screen will transition to the QUADS Project Summaries Navigator and View.

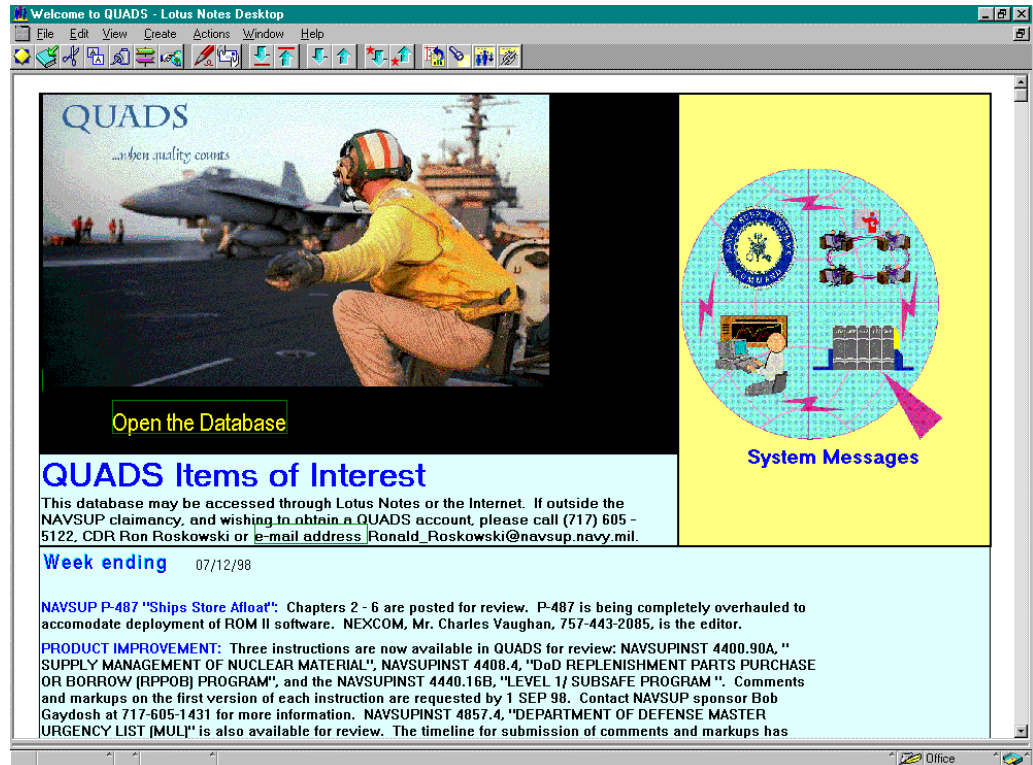


Figure 5.3 QUADS Billboard

Project Summaries Navigator & View

Figure 5.4 shows the Project Summaries Navigator and View. You will automatically be able to see a listing of all current QUADS Project Summaries in the “view” on the right half of the screen. You will also see the navigation panel on the left half and the SmartIcons and search bar at the top of the screen.

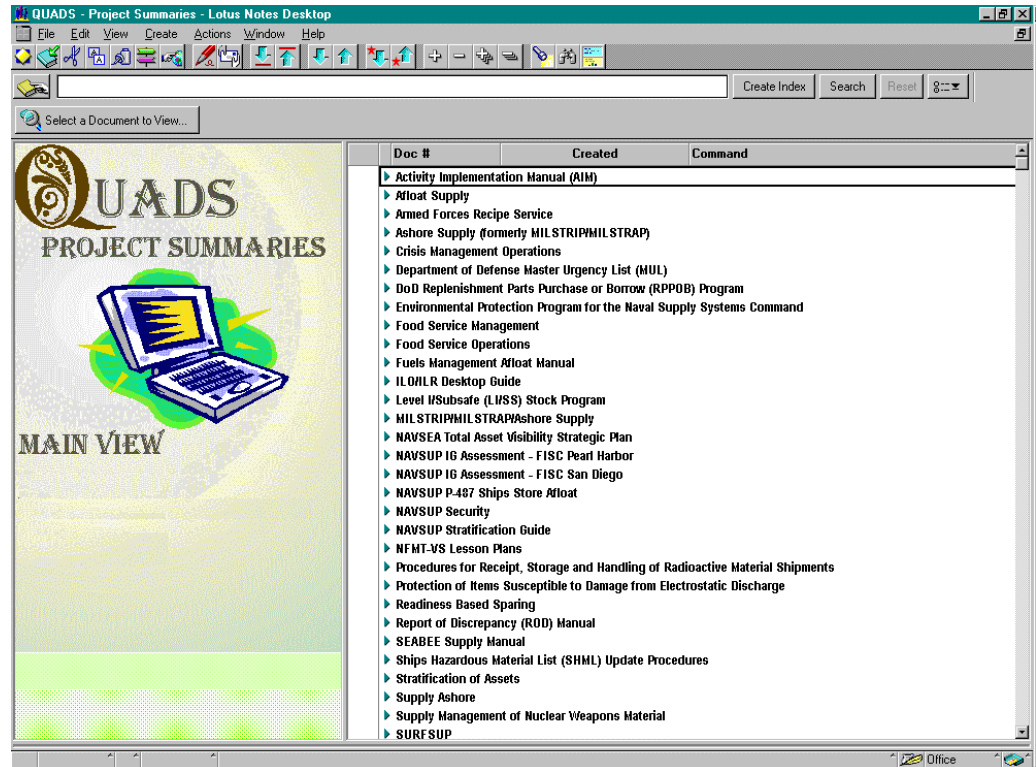


Figure 5.4 Project Summaries Navigator & View

Expanding & Collapsing

Expanding and collapsing are means by which you can, to some extent, control desktop size, appearance, and navigation processes. From the Project Summaries Navigator and View, two methods exist for expanding or collapsing documents. The first is to use the arrowheads, commonly known as “twisties,” located next to the project titles. In Figure 5.5, all of the QUADS Project Summaries currently listed in the view are superior documents, or documents at the highest level of the document hierarchy. Each of these superior documents has a arrowhead pointing towards its title in the view. A twistie pointing towards a project title, or a collapsed twistie, indicates that subordinate documents are available. A single click on a Project Summary’s collapsed twistie will reveal its sub-documents. To subsequently remove these subordinate documents from view, simply single click the downward pointing, or expanded, twistie next to the Project Summary title.

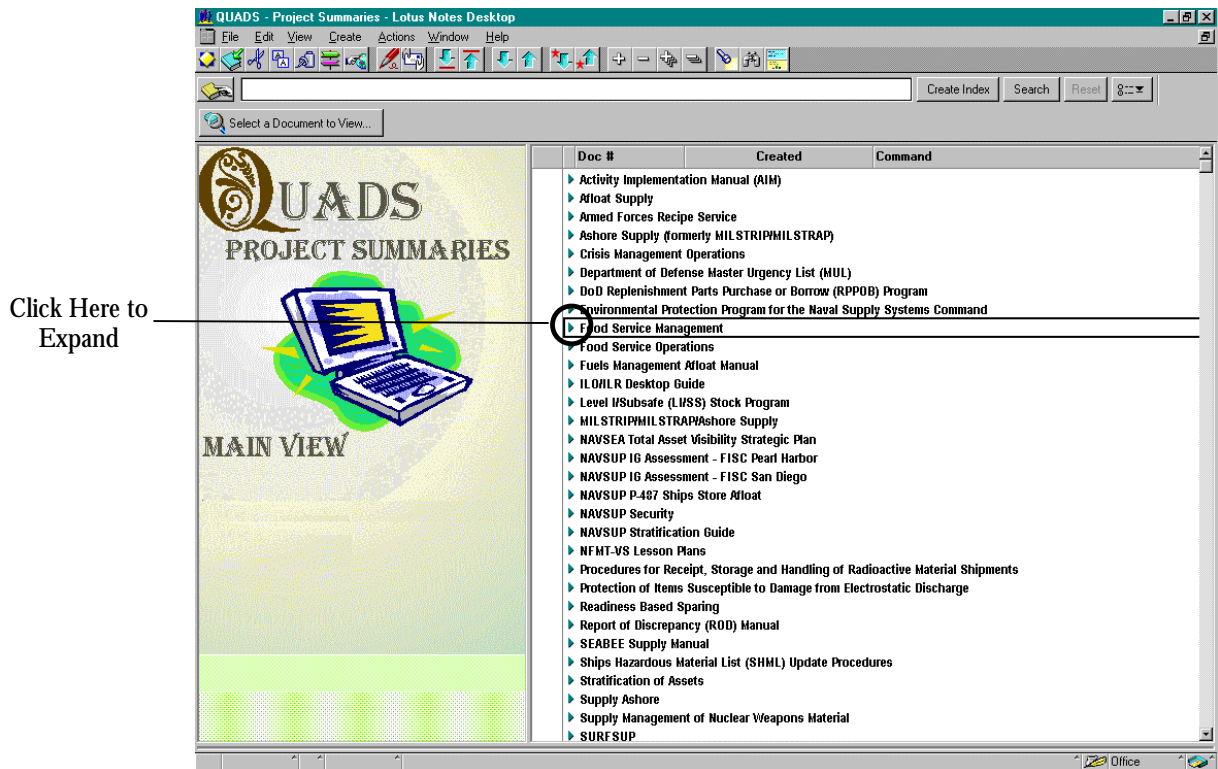


Figure 5.5 View Showing Superior Documents Only

For instance, to expand the Project Summary “Food Service Management,” single click directly on its twistie, as shown in Figure 5.5. Upon clicking its twistie, the subordinate documents will be revealed, as shown in Figure 5.6.

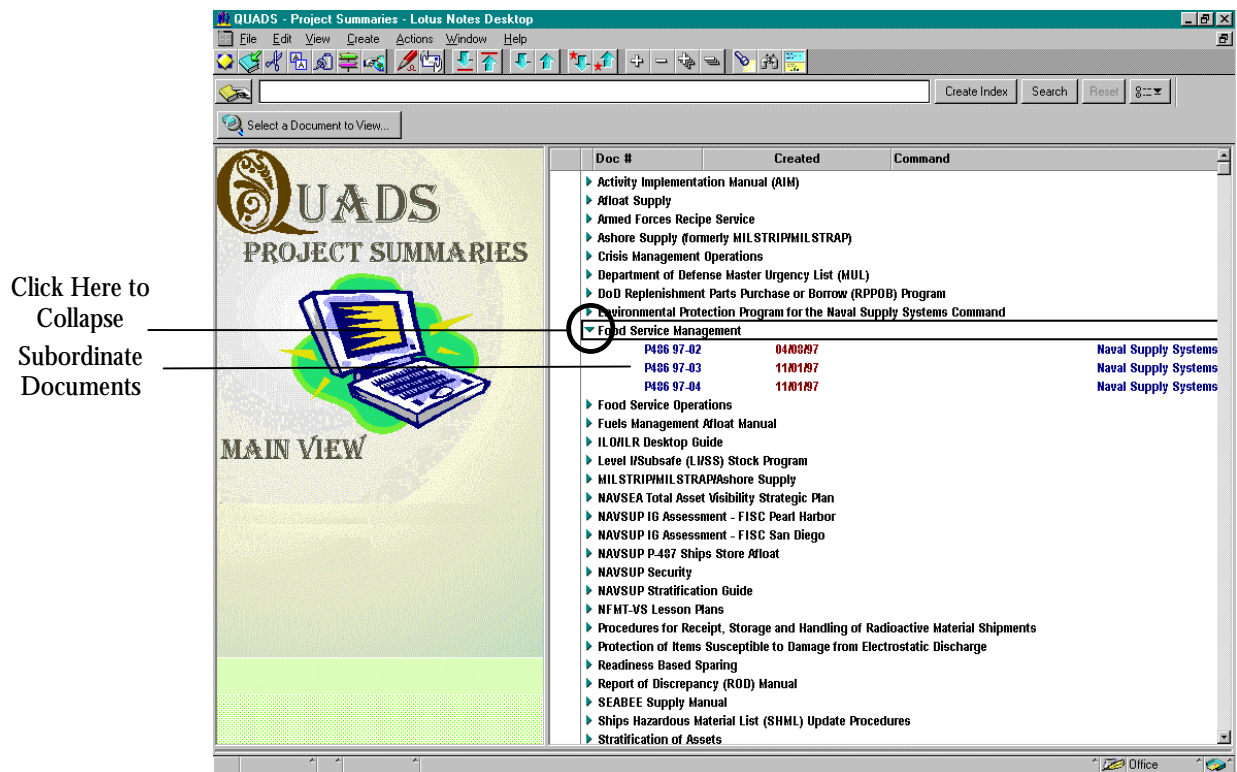
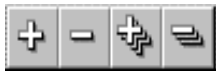


Figure 5.6 View Showing Subordinate Documents

To subsequently conceal the subordinate documents and distill the view to the highest level, single click the expanded twistie.



Another method of expanding and collapsing project titles is to use the Lotus Notes SmartIcons, located on the toolbar at the top of the workspace. The **View Expand** and **View Collapse** icons behave in the same manner as the twisties in that they expand or collapse only the selected document. In contrast, the **View Expand All** and **View Collapse All** icons expand or collapse all Project Summaries in the view. To fully expand the view, single click the **View Expand All** SmartIcon. The view is shown fully expanded at Figure 5.7. To fully collapse the view, single click the **View Collapse All** SmartIcon. The view is shown fully collapsed at Figure 5.8.

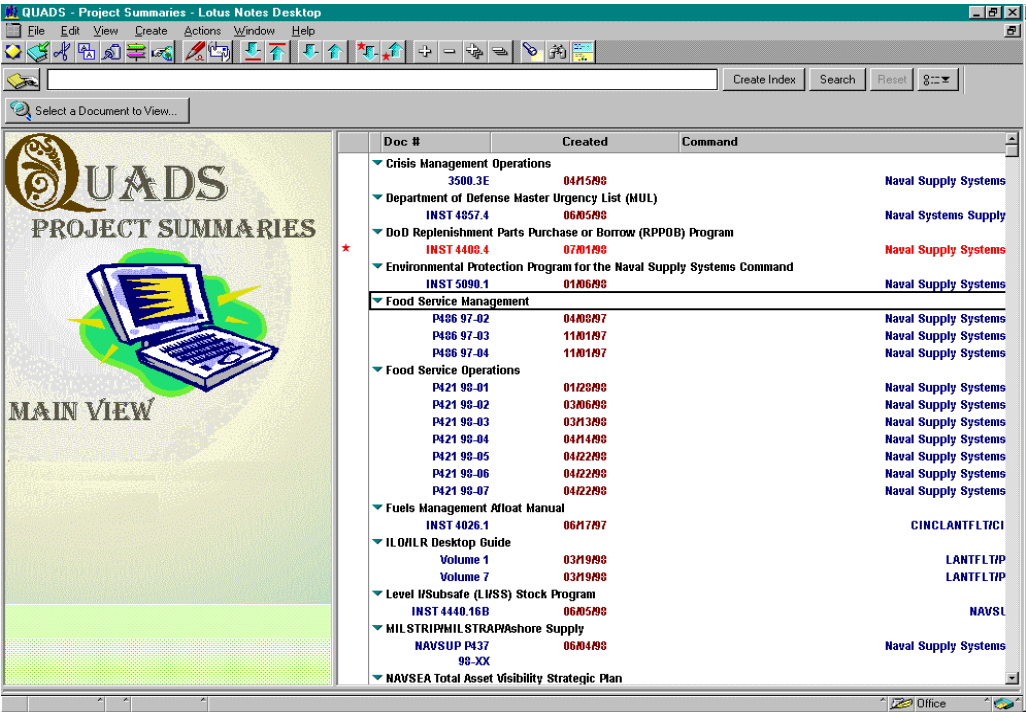


Figure 5.7 Project Summaries Navigator & View - Fully Expanded

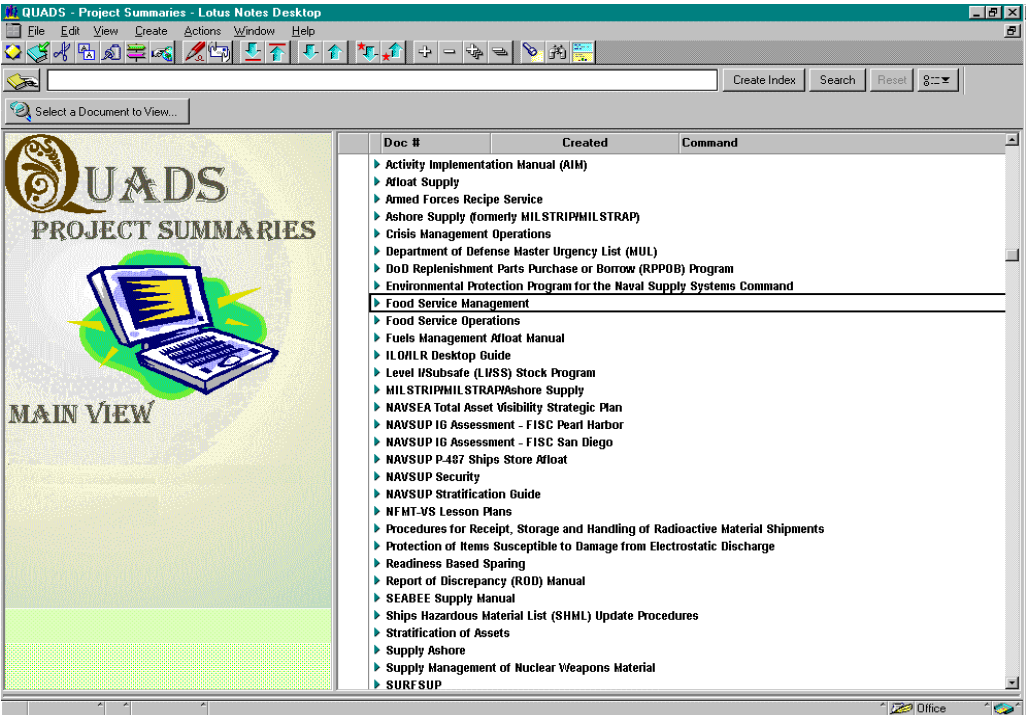


Figure 5.8 Project Summaries Navigator & View - Fully Collapsed

From the Project Summaries Navigator and View, you have two options:

- ❑ View a Project Summary document
- ❑ Navigate directly to the Main View

To view a Project Summary document, scroll to the desired document in the view, highlight it, as shown in Figure 5.9, and double click.

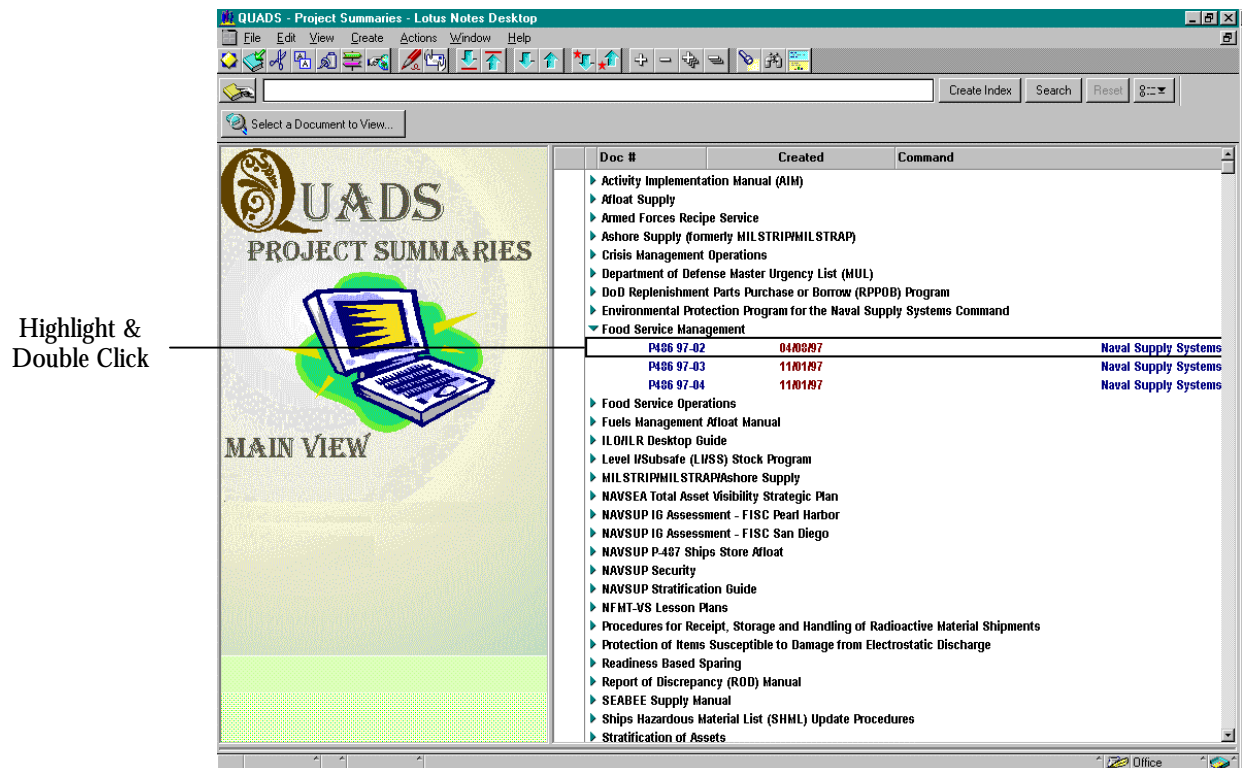


Figure 5.9 Highlighting a Project Summary for View

Viewing a Project Summary

A Project Summary document, such as the one shown in Figure 5.10, will appear once opened. Overall project information in the Project Summary includes the project title, originator, document number, point of contact (POC), plan of action & milestones (POA&M), and review team members. Document sponsor or editor's guidance is shown in the section entitled "Reviewer Notes." It may be necessary to scroll down to view all of the project information contained in the Project Summary.

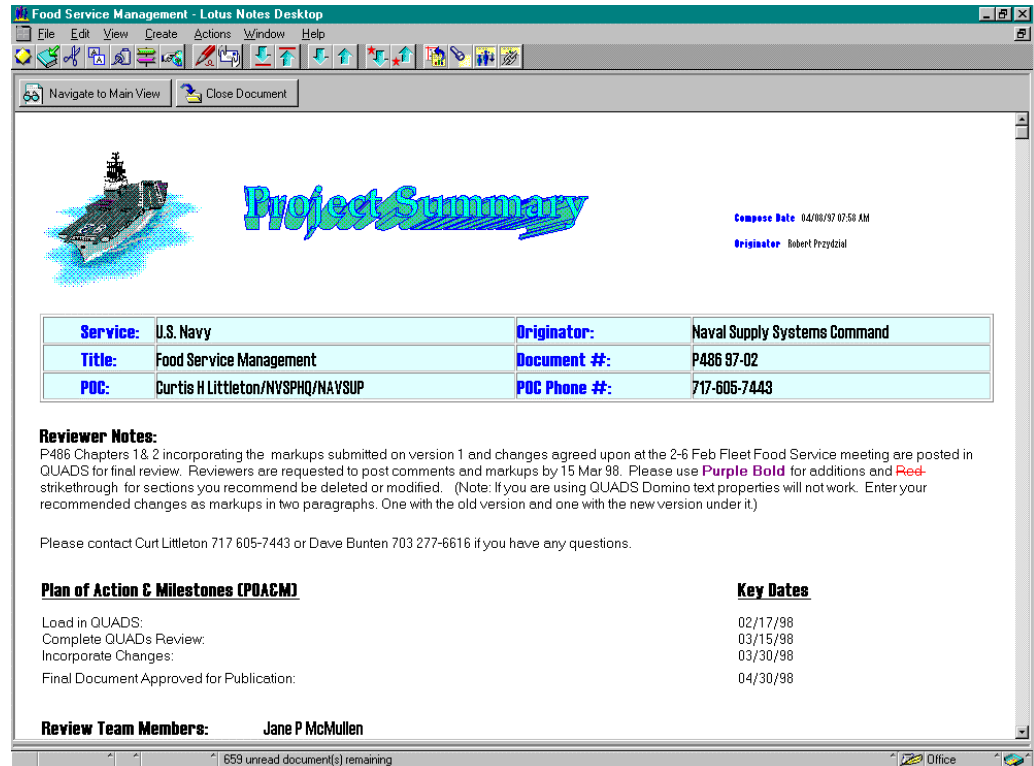


Figure 5.10 Project Summary Document

When finished reviewing the Project Summary, select the **Close Document** button at the top of the screen to return to the Project Summaries Navigator and View or select the **Navigate to Main View** button to automatically move to the QUADS Main View for the current selection.

Being Added as a Reviewer

The Project Summary document shown in Figure 5.11 does not have a **Navigate to Main View** button in the upper left corner. This is due to the fact that you are not currently an authorized reviewer for this particular project. You may still review the Project Summary to see if you are interested in becoming a reviewer, however. If so, contact the project point of contact (POC); most welcome the participation of additional subject matter experts. The POC name and phone number are listed on the Project Summary.

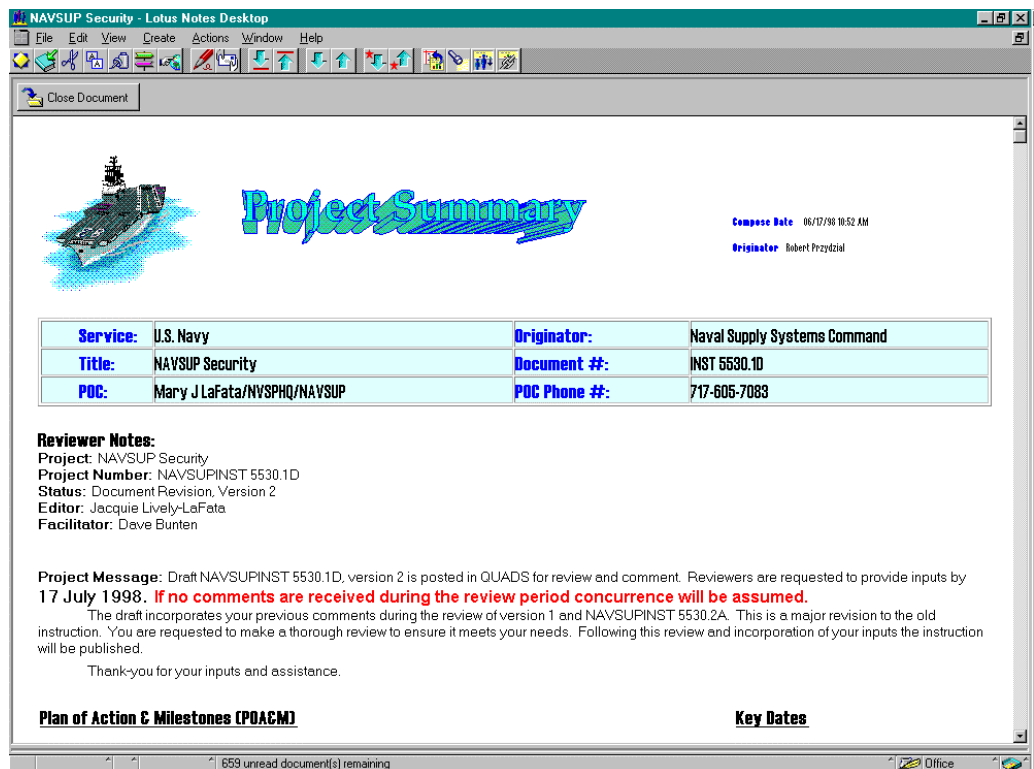


Figure 5.11 Project Summary Without “Navigate to Main View” Button

Navigating Directly to the Main View

You are not required to view a Project Summary document in order to access the Main View screen. You may instead navigate directly to the Main View and skip the Project Summary altogether. To do so, perform one of the following procedures:

- ❑ Select the **Select a Document to View** button from the top of the Project Summaries view shown in Figure 5.12
- ❑ Select the **Main View** hotspot from the Project Summaries navigation panel

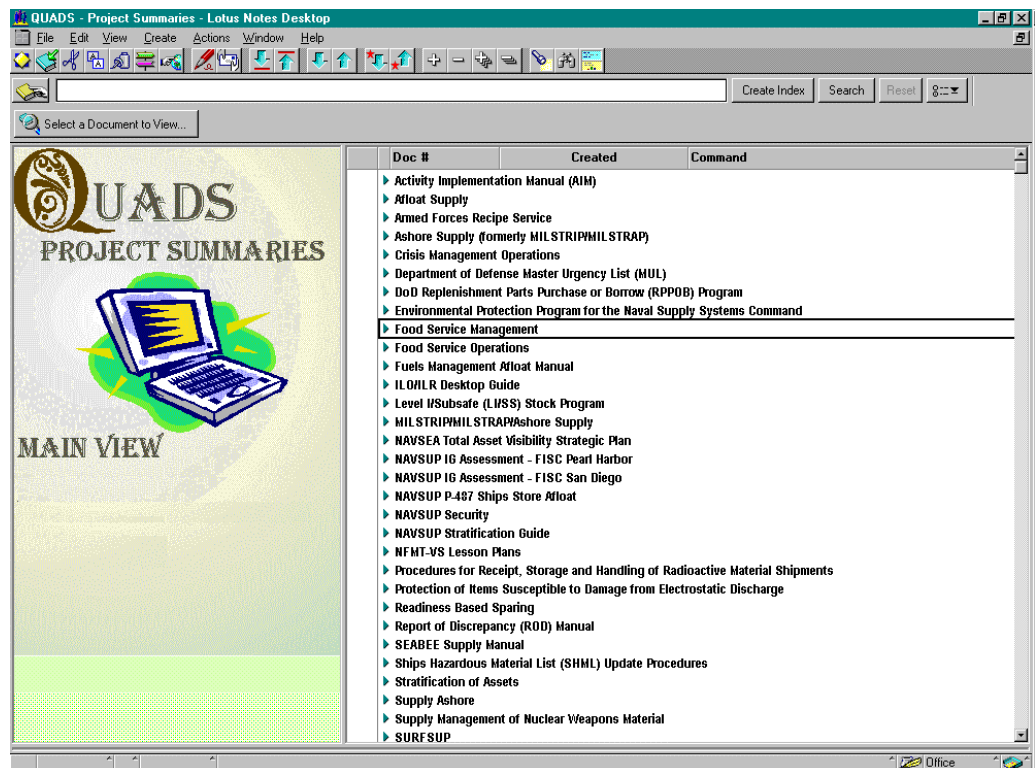


Figure 5.12 Navigating Directly to the Main View

A dialog box, like the one depicted in Figure 5.13, will appear. The dialog box shows a listing of only those QUADS projects for which you are an authorized reviewer. To continue, scroll to the desired project title in the dialog box, highlight it, and click **OK**. The screen will navigate directly to the Main View for the selected project.

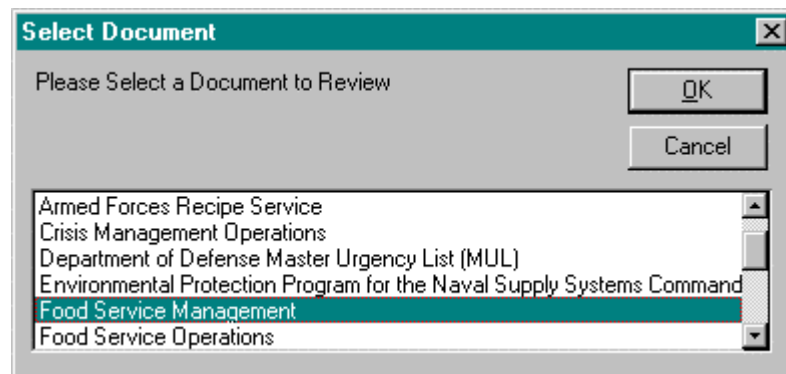


Figure 5.13 Select Document Dialog Box

Note:

If you are not a reviewer for a particular project, you cannot access the Main View for that project, but you may still view its Project Summary document.

Main Navigator & View

There are several ways to access the QUADS Main Navigator and View for a particular project, as we have already seen. Regardless of the method used, the screen will transition to the QUADS Main Navigator and View for the selected document. Looking at a diagram of the Main Navigator and View in Figure 5.14, you will see the navigation panel on the left, the project outline on the right, and the search bar across the top. If the search bar is not present, clicking the **View Show/Hide Search Bar** icon in the Lotus Notes SmartIcon set, or using the **View | Search Bar** dropdown menu, will make it appear. Lotus Notes search bar features are discussed in Chapter 4.

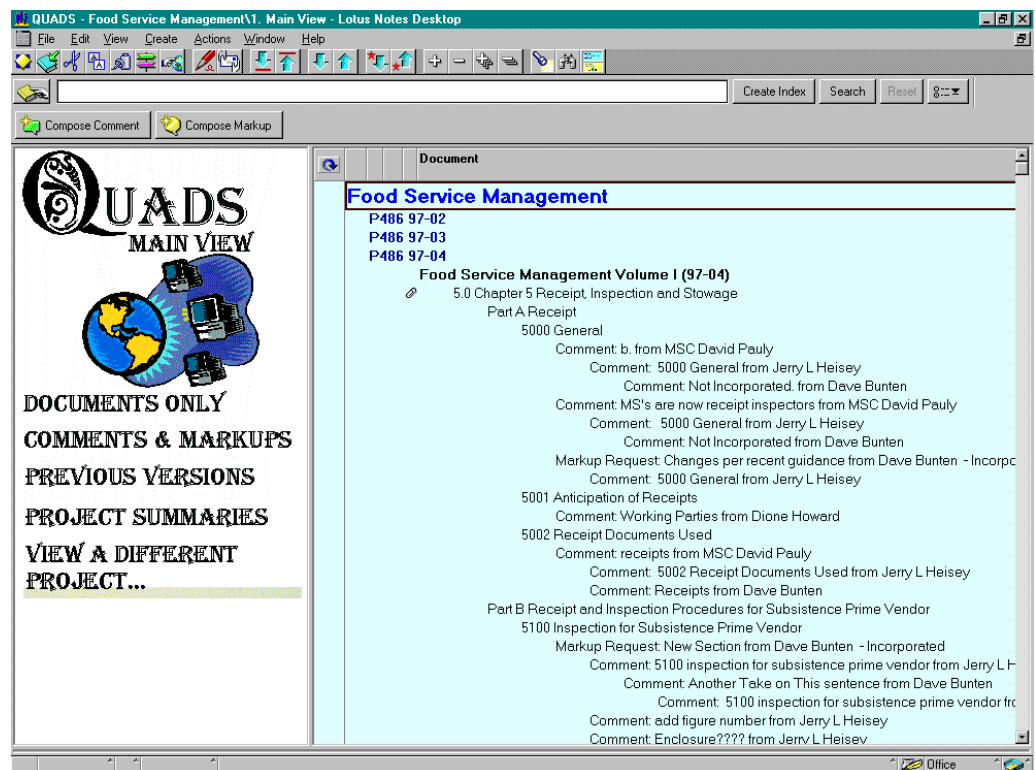


Figure 5.14 Main Navigator & View

Navigation Panel

The navigation panel on the left side of the screen allows you to customize what is shown in the view on the right side of the screen. Several different views are accessible from the navigation panel, including Main View, Documents Only, Comments and Markups, Previous Versions, Project Summaries, and View a Different Project.

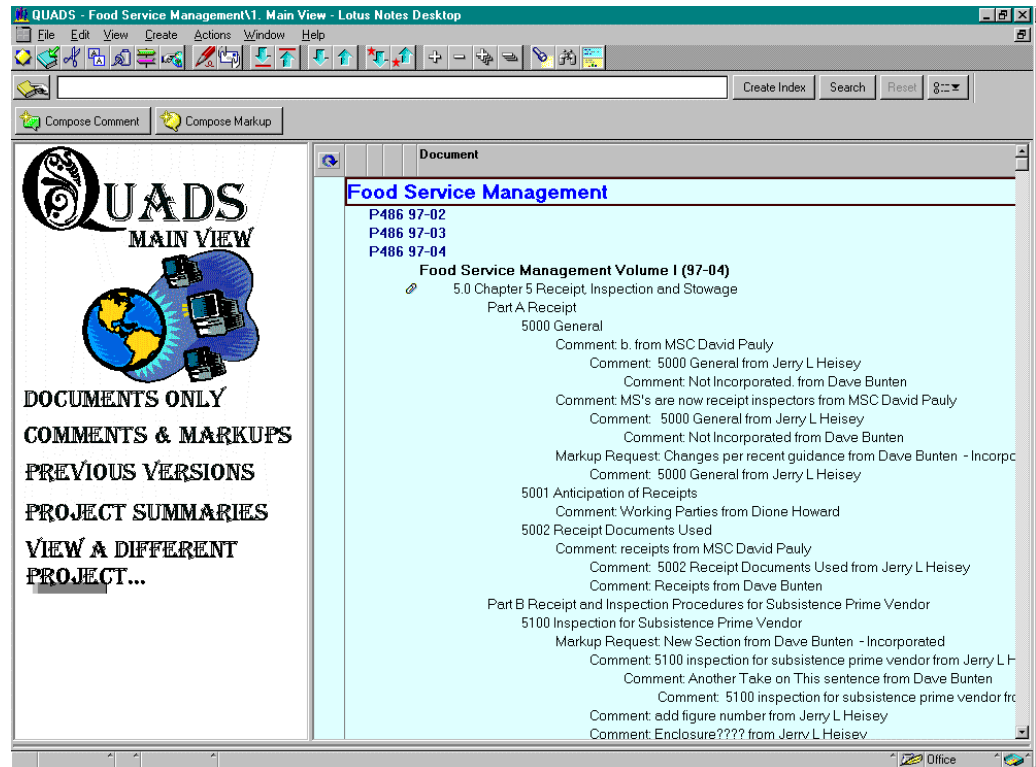


Figure 5.15 Main View

MAIN VIEW

Selecting the **Main View** hotspot from the navigation panel accesses the QUADS Main View. The Main View shows all documents within a particular project, as well as associated comments and markup requests aligned with the documents to which they apply. Figure 5.15 shows the Main View for the “*Food Service Management*” project.

DOCUMENTS
ONLY

In addition to the QUADS Main View, several other views are accessible from the navigation panel. You can see the documents in the view, without comments and markup requests embedded, by clicking the **Documents Only** hotspot. The Documents Only view for the “*Food Service Management*” project is shown in Figure 5.16. Incidentally, you may still enter comments or markup requests from this view. After replicating, these comments and markups will not immediately be visible, however, because they are hidden in the Documents Only view. Either return to the Main View or switch to the Comments and Markups view to see your input.

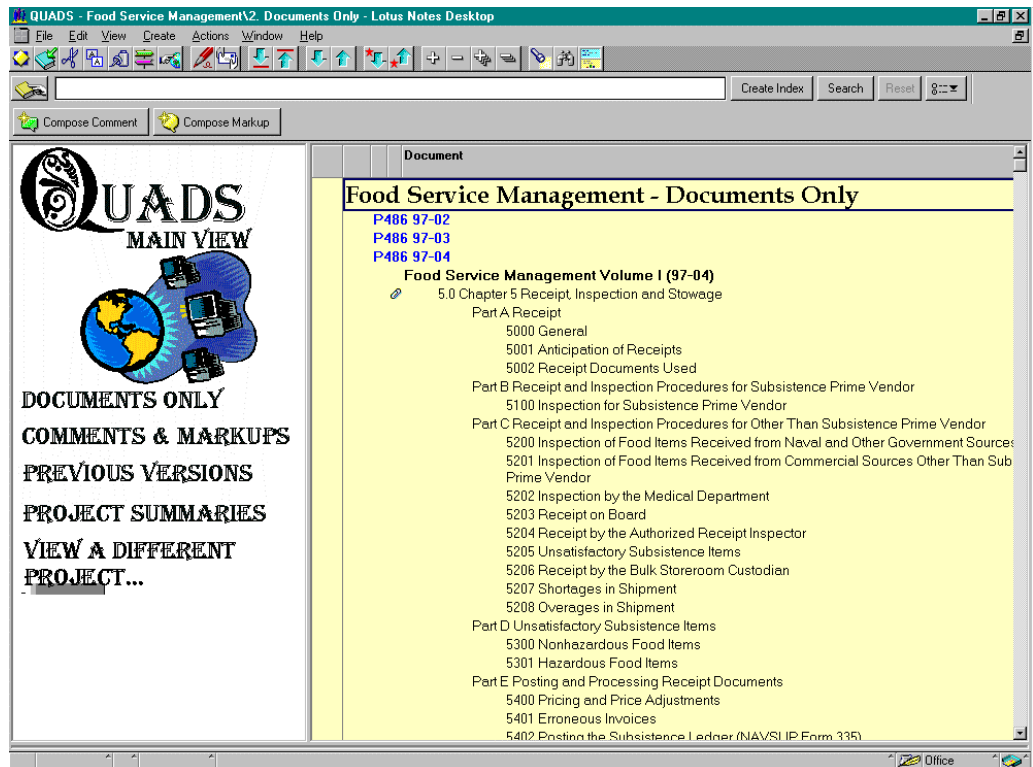


Figure 5.16 Documents Only View

COMMENTS &
MARKUPS

In a similar fashion, you can view comments and markups only by clicking the **Comments & Markups** hotspot from the navigation panel. The Comments and Markups view is shown at Figure 5.17. The sort order of this view is comments first in order by date, beginning with the most recent, followed by markup requests in order by date, beginning with the most recent. If no comments or markup requests have been submitted for a particular project, a blank screen will be returned.

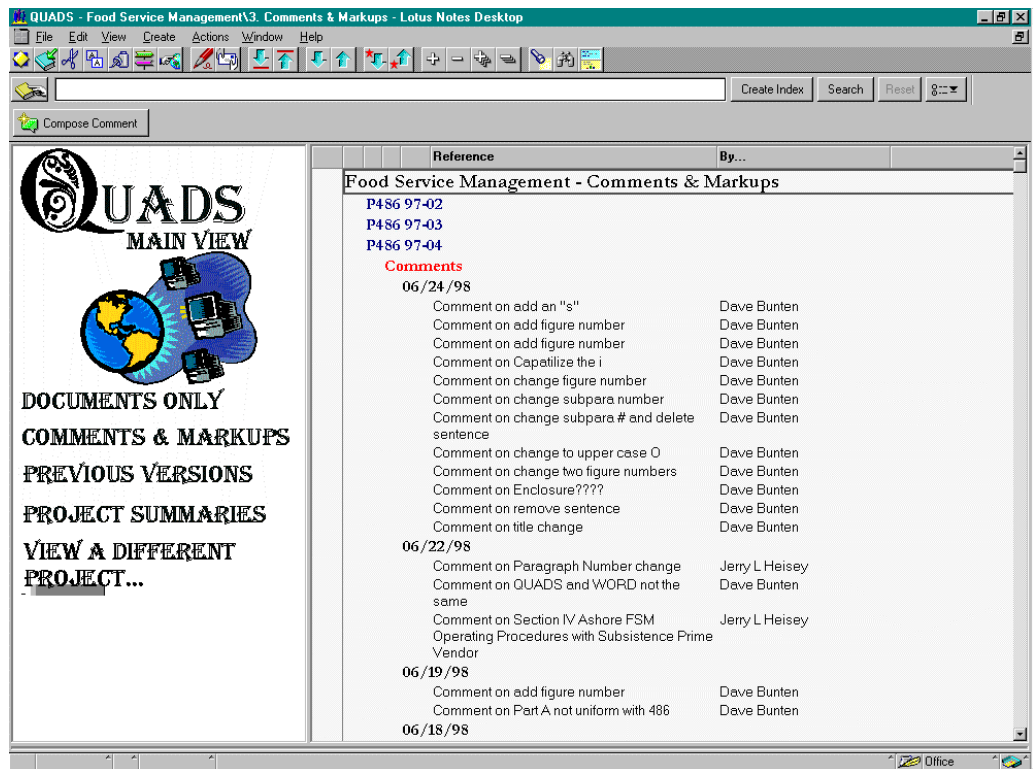


Figure 5.17 Comments & Markups View

PREVIOUS
VERSIONS

Previous versions of a project may be viewed by selecting the **Previous Versions** hotspot on the navigation panel. Previous versions of a document will provide useful comparisons during the review process. You can view the desired previous version in text form simply by highlighting its title in the view and double clicking. The Previous Versions view for “*Food Service Management*” is shown in Figure 5.18. If no previous version exists, a blank screen will be returned.

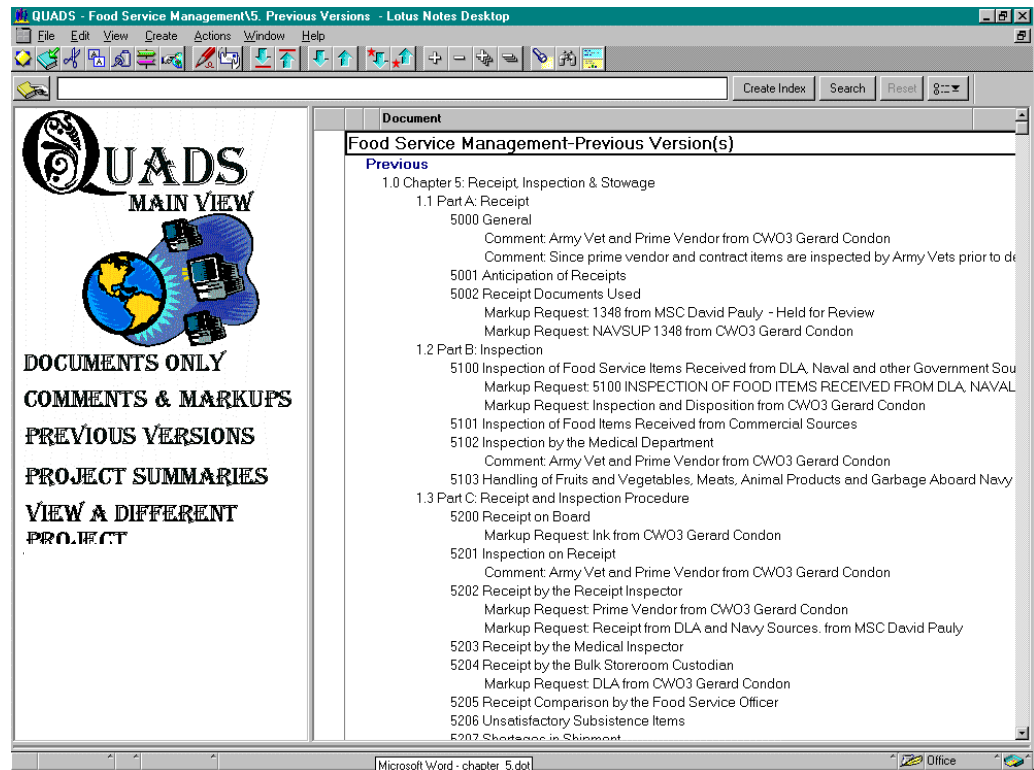


Figure 5.18 Previous Versions View

PROJECT
SUMMARIES

Selecting the **Project Summaries** hotspot on the navigation panel will navigate the screen back to the Project Summaries Navigator and View. From there, you can view other Project Summary documents.

DIFFERENT
PROJECT

To view another project, select the **View a Different Project...** hotspot from the navigation panel. Upon selecting this view, a dialog box will appear. Recall that this box shows a listing of only those projects to which you have access. Scroll to the desired project title, highlight it, and click **OK**. The screen will transition to the QUADS Main View for the selected project.

Navigating Documents from the Main View

All QUADS documents share some common appearance features. One such feature is the “outline” or hierarchical structure, which can be seen in Figure 5.19. Each document is divided by volume, by chapter, by part, and by specific articles. The indentation and arrangement of the various documents in the view further emphasizes this hierarchy. When you submit a comment or markup request pertaining to a specific document section, the submitted input will appear in the view below the referenced document section, and it will be slightly indented. Once the view has been refreshed or replicated, the submitted input will have a red “arrow” pointing towards its title. This red arrow indicates that there is new information on your desktop. The arrow will remain in place for several days, and then will automatically disappear after that time. It is simply a graphical aid used to highlight new information. Another common appearance feature is the “paperclip” symbol, which indicates that a file is attached to a particular document. Additional details are available in Chapter 4.

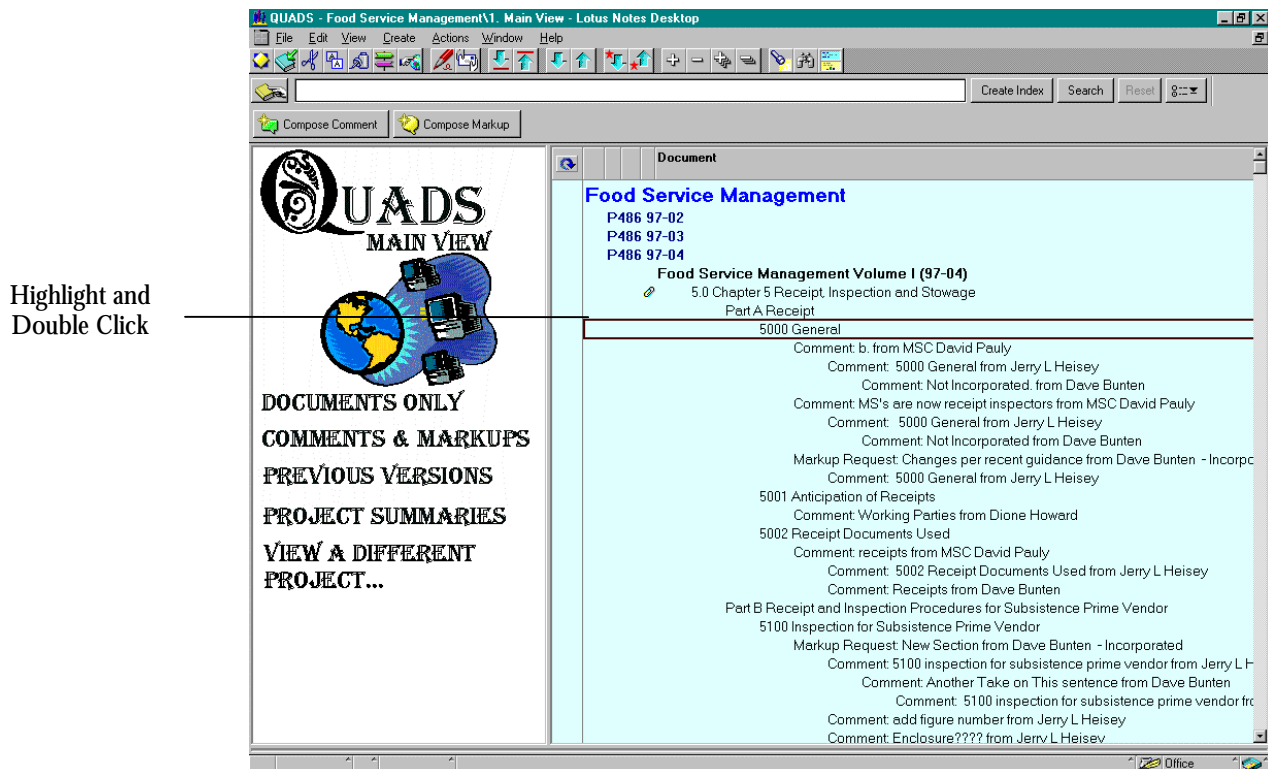


Figure 5.19 Highlighting a Document for View

To look at any document listed in the project view on the right half of the screen, highlight the document title, as shown in Figure 5.19, and double click. The screen will transition to the selected QUADS document, comment, or markup request.

Viewing QUADS Documents

After opening the document, you will be able to see the text in paragraph form. A typical QUADS document is depicted in Figure 5.20. All QUADS documents share some common characteristics. Each document form displays a Title and Document Number at the top of the screen. In this example, “*Food Service Management*” is the title, and the document # is P486 97-04. A Compose Date and Originator block appears in the upper right corner of the screen. This shows when and by whom the document was created. Below the graphic to the left, you will see a Section title, which identifies the particular document, in this example “5000 General.” Finally, you will see the actual text to review below the part of the form entitled Document Section. Often revisions are highlighted with text properties (e.g., color bold, italics, underline) to indicate where changes have been made from a previous version. At the very bottom of the form is a space where a file may be attached.

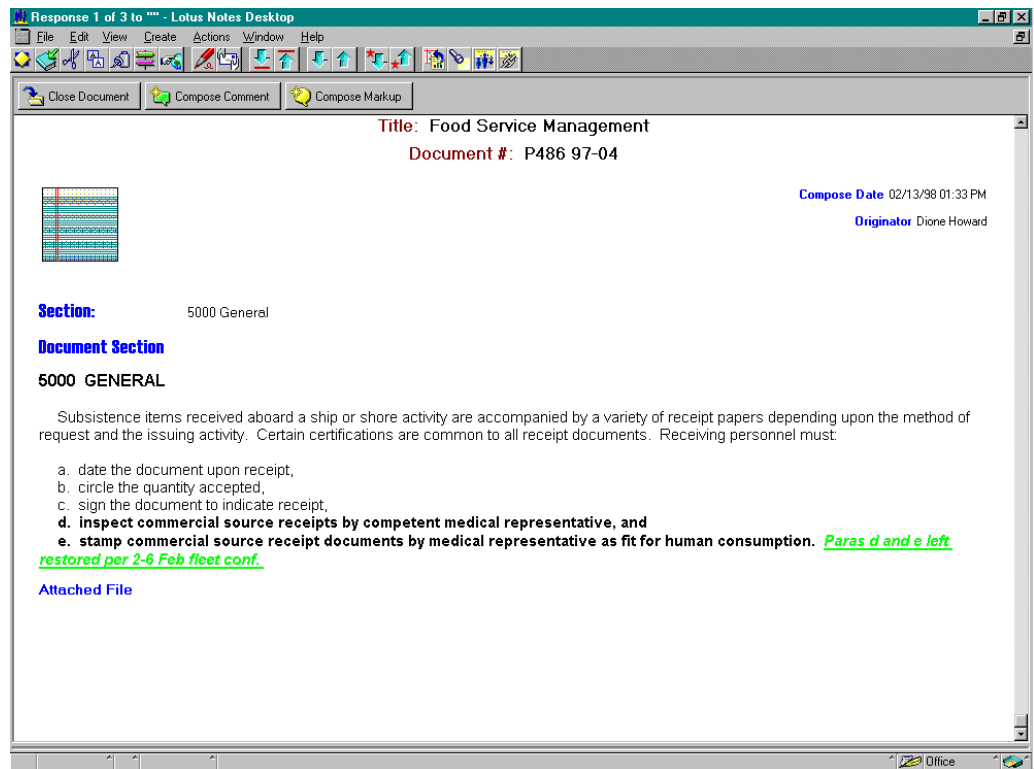


Figure 5.20 Typical QUADS Document

While viewing a particular document, like the one in Figure 5.20, you can access the Lotus Notes SmartIcon set. Note, however, that the **View Expand** and **View Collapse** icons and the **View Expand All** and **View Collapse All** icons are no longer present from this view. This is because they are not applicable in this portion of the database. This emphasizes the concept that the SmartIcons are “context-sensitive.” You can also use the **Navigate Previous** and **Navigate Next** icons from either the outline view or from the open document.

Another way of looking at the items in the view is to create a tiled display. To create a tiled display, as shown in Figure 5.21, simply slide the bottom pane divider up by clicking and dragging it up, or select the **View Show/Hide Preview Pane** in the Lotus Notes SmartIcon set. This feature allows you to work multiple sections, or to have the outline view open while reading the specific text in the document.

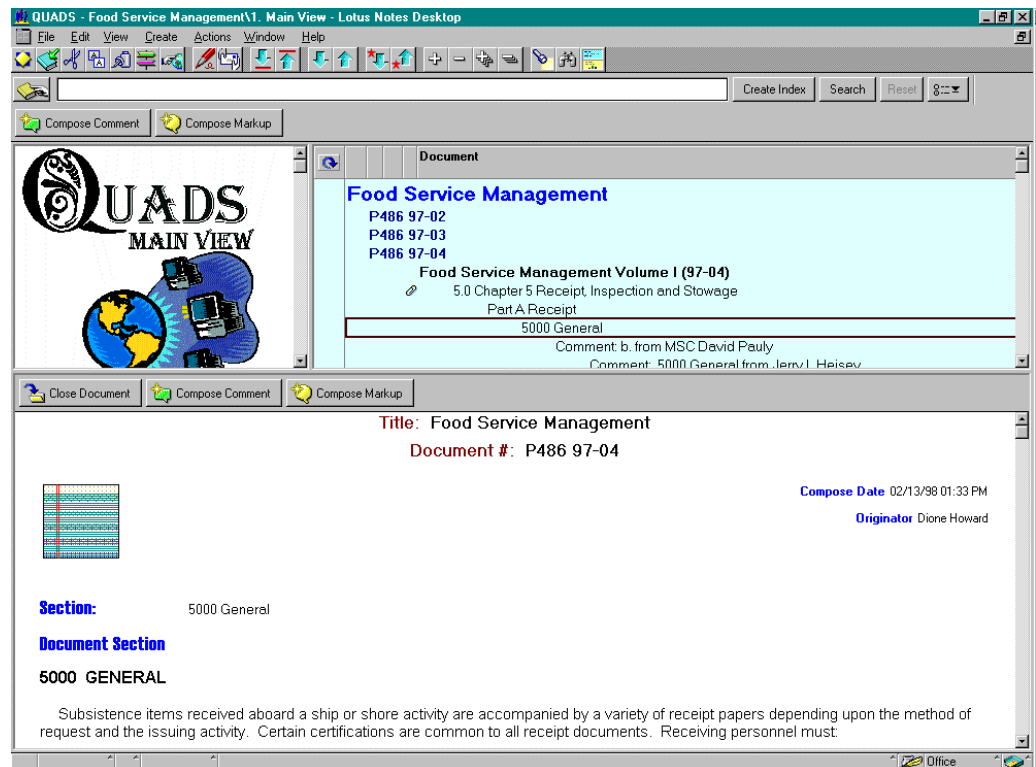
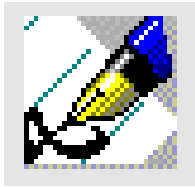


Figure 5.21 Tiled View with Respective Document

The Process of Review -

Markup Requests and Comments

Markup requests and comments are the methods by which a reviewer provides specific input to the document editor using the QUADS system. With QUADS, electronic comments and markups can be added at any time.



Markup Requests

Markup requests are the QUADS approach to the traditional “redline.” Markup requests are not immediately acted upon in QUADS, but rather, are reviewed by the publication editor for adjudication of the decision regarding the extent to which the markup request will be incorporated.

Composing a Markup Request

To compose a markup request, do either one of the following:

- ❑ Select the **Compose Markup** button at the top of the document to which the request applies, as shown in Figure 5.22
- ❑ Select the **Compose Markup** button from the Main View while highlighting the desired document, as shown in Figure 5.23

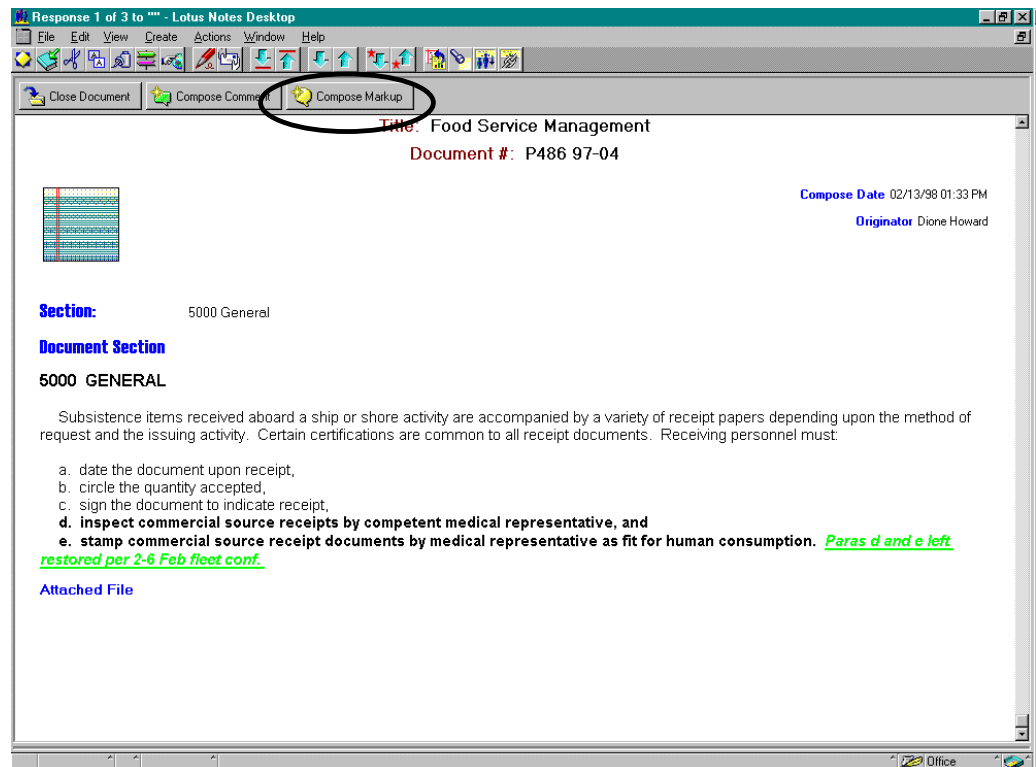


Figure 5.22 “Compose Markup” Button on Document

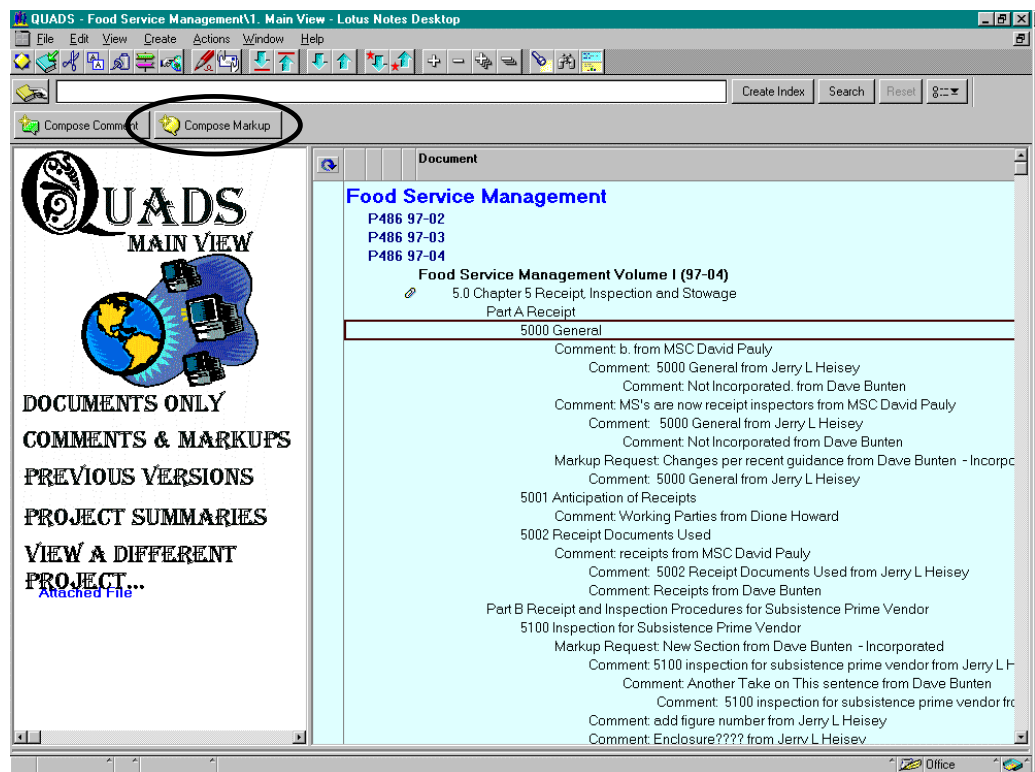


Figure 5.23 “Compose Markup” Button from Main View

After selecting this **Compose Markup** button, the Markup Creation/Editing screen will appear.

New Markup Request - Lotus Notes Desktop

File Edit View Create Actions Text Window Help

Close Document Compose Comment

Compose Date: 07/23/98 11:01 AM
Originator: Meredith Dykes

Reference: 5000 General

Key Thought:

Markup Description

Subsistence items received aboard a ship or shore activity are accompanied by a variety of receipt paper depending upon the method of request and the issuing activity. Certain certifications are common to all receipt documents. Receiving personnel must:

- a. date the document upon receipt.
- b. circle the quantity accepted.
- c. sign the document to indicate receipt.
- d. inspect commercial source receipts for condition and request medical department or Veterinary Service inspection for products or questionable quality by competent medical representative, and
- e. stamp non-Prime Vendor commercial source receipt documents by medical representative as fit for human consumption.

Para's d and e left restored per 2-6 Feb fleet conf

Markup Disposition

The above markup was... ☒ Incorporated ☐ Partially Incorporated

[<Size=70 Maxlength=80>]

Figure 5.24 Markup Creation/Editing Screen

The form opens in Edit Mode as evidenced by the brackets [] which appear throughout the form. Edit mode allows you to enter the data in the designated fields of the form. The Reference at the top of the page shows the document section against which you are making a markup request. Be sure this is accurate before proceeding.

Enter a brief key thought in the space provided. Type markup text with your specific recommendations in the brackets in the "Markup Description" field. Note that the standard editing functions of cut/paste/copy, spell-check, and the like are available as SmartIcons. Text properties (e.g., color, bold, underline, italics) are also available to further distinguish the markup text. To access these text properties, pull down the **Text** menu from the toolbar.

Files may be attached and submitted with either a markup request or a comment. The process of attaching files is examined at length in Chapter 4. To submit the markup request, select the **Close Document** button. A confirmation dialog box will appear as shown in Figure 5.25; click **Yes** to save and submit the markup request.

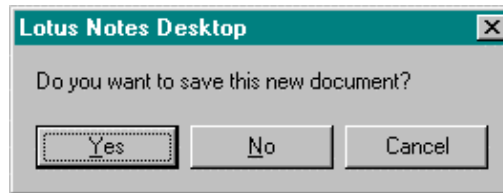


Figure 5.25 Save Dialog Box

Dispositioning of Markups

The project editor has the responsibility to provide feedback to the reviewer as to the disposition of input. Generally, the editor will check the appropriate disposition radio button to indicate if the markup was incorporated, partially incorporated, not incorporated, or held for review. An example of a “dispositioned” markup request is shown in Figure 5.26.

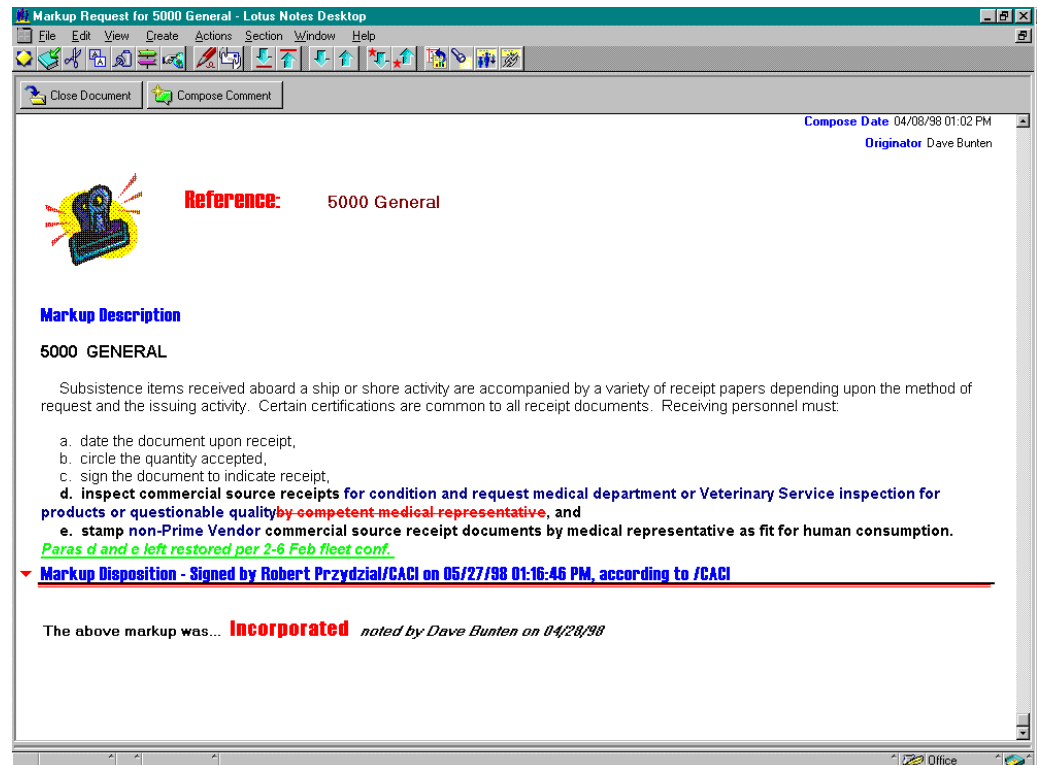
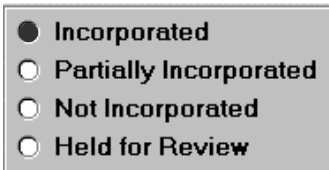


Figure 5.26 Disposition of Markup

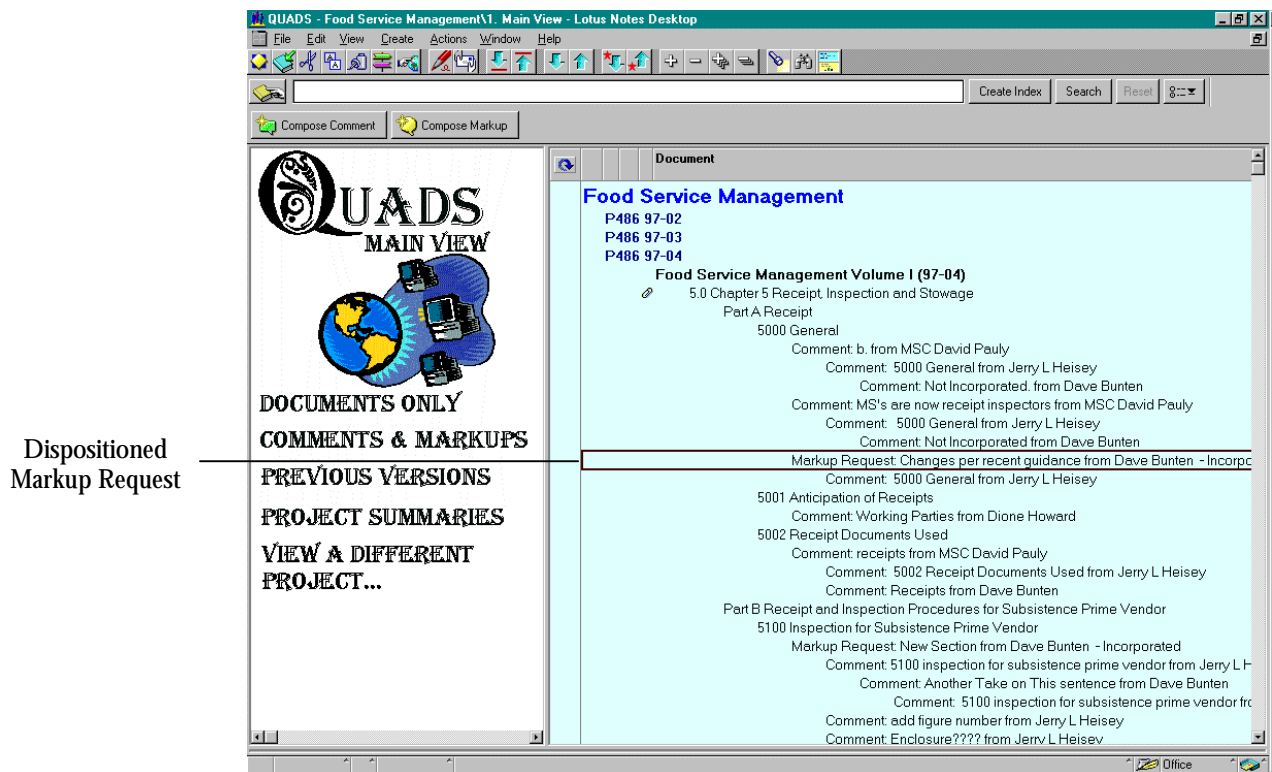


Figure 5.27 Outline View Showing Markup Disposition

Figure 5.27 shows the dispositioned markup as it aligns in the outline view. Notice that the markup request appears below the document section to which it applies, "5000 General," and is slightly indented.

Generating a Comment

Commenting capability is provided to pose questions and to add information or another perspective to a posted markup, comment, or document section. To generate a comment, do either one of the following:

- ❑ Select the **Compose Comment** button while viewing the document, comment, or markup, as shown in Figure 5.28
- ❑ Highlight the desired document, comment, or markup from the view and select the **Compose Comment** button at the top of the Main View screen, as shown in Figure 5.29

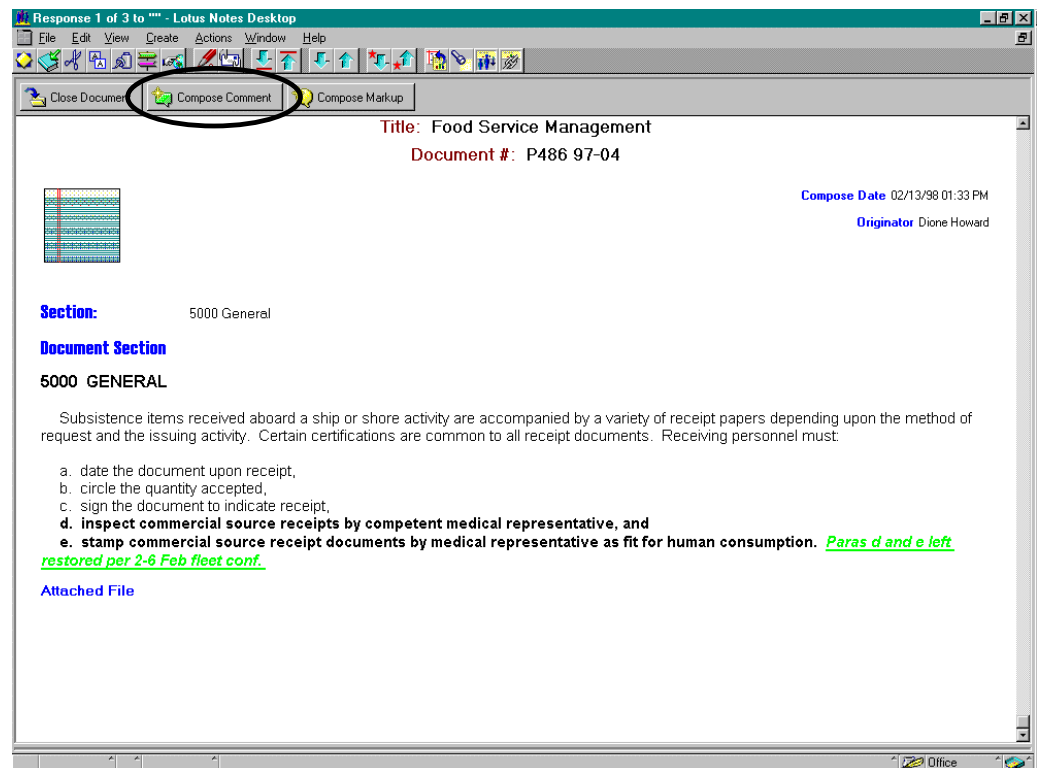


Figure 5.28 "Compose Comment" Button on Document

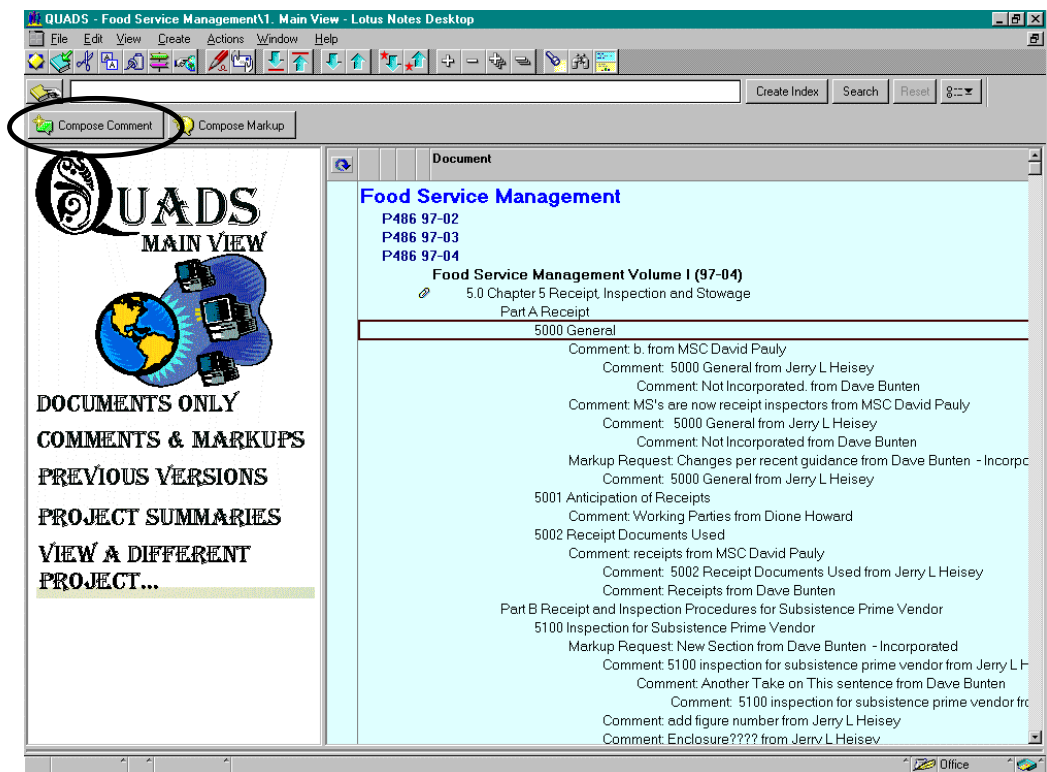


Figure 5.29 “Compose Comment” Button from Main View

Regardless of which method you choose, the Comment Creation/Editing screen, as shown in Figure 5.30, will appear.

Type a brief key thought and the comment text in the space provided. Standard editing functions of cut/paste/copy, spell-check, text properties, and the like are available. To submit the current comment, click the **Close Document** button at the top of the editing screen. When the confirmation dialog box appears, click **Yes** to save and submit the comment.

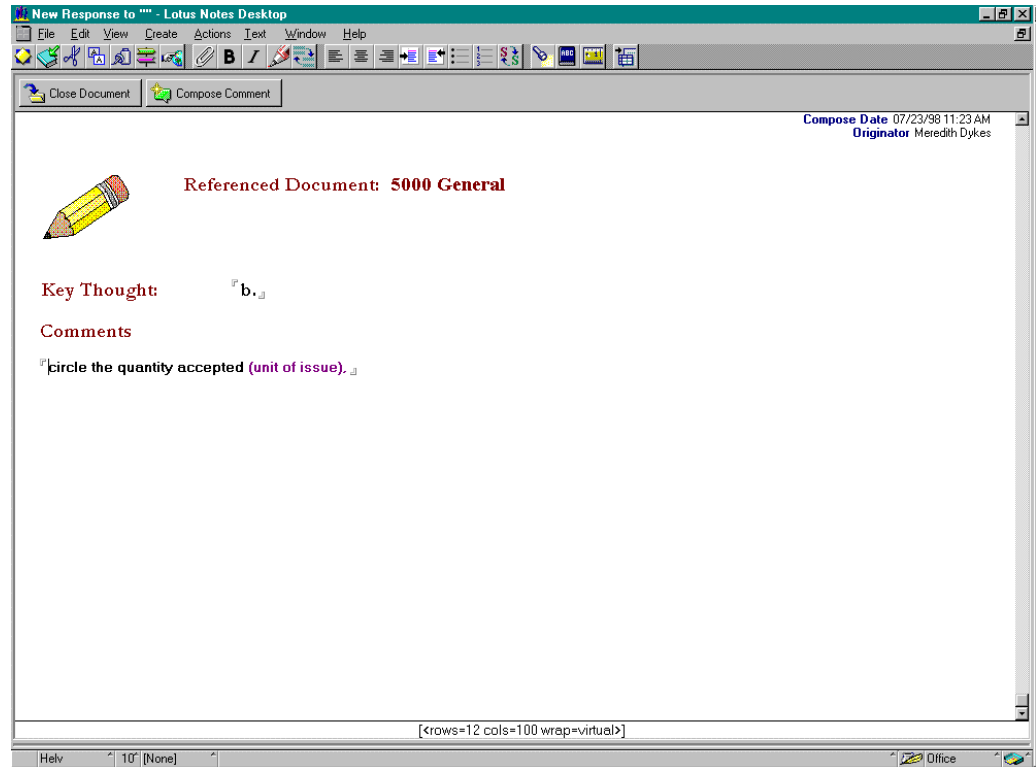


Figure 5.30 Comment Creation/Editing Screen

Figure 5.31 shows a saved comment as it aligns in the outline view.

Comment in
Outline View

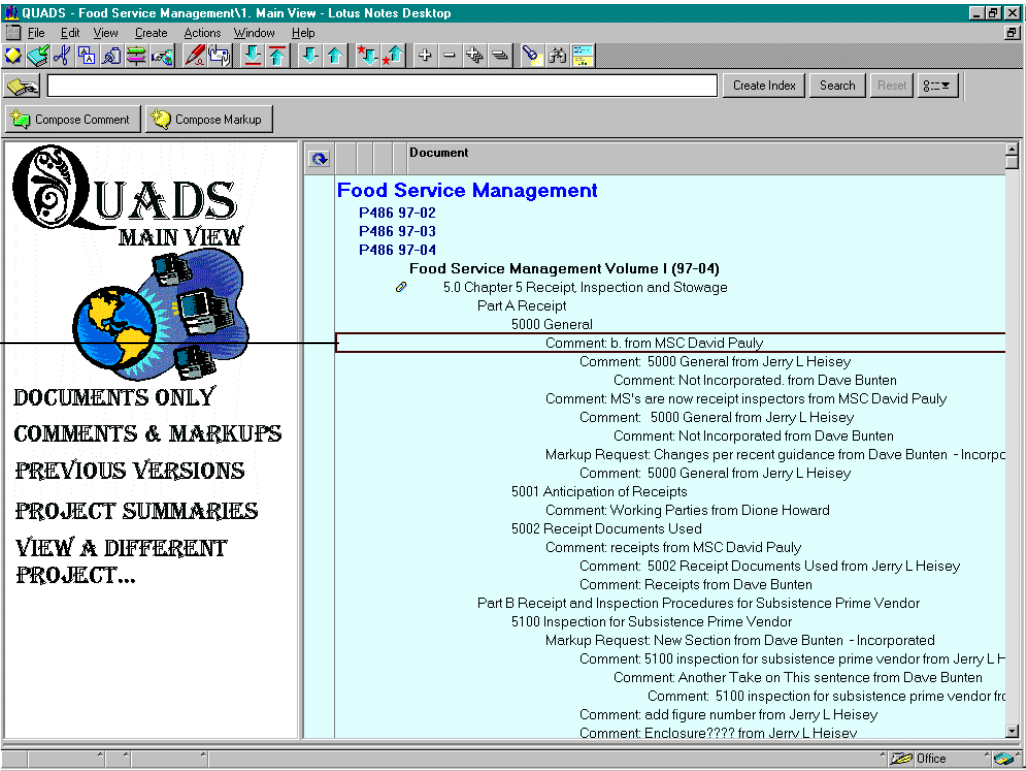


Figure 5.31 Outline View Showing Comment

Interleaving Markups and Comments

The ability to generate comments and markups electronically is a strong feature of the QUADS system. QUADS allows comments on markups and comments on comments. This feature creates the collaborative feel of a team working jointly on a document and has similar attributes to a discussion thread in most e-mail systems. It also creates a record behind the rationale for making decisions about policy revision and helps to streamline the review process.

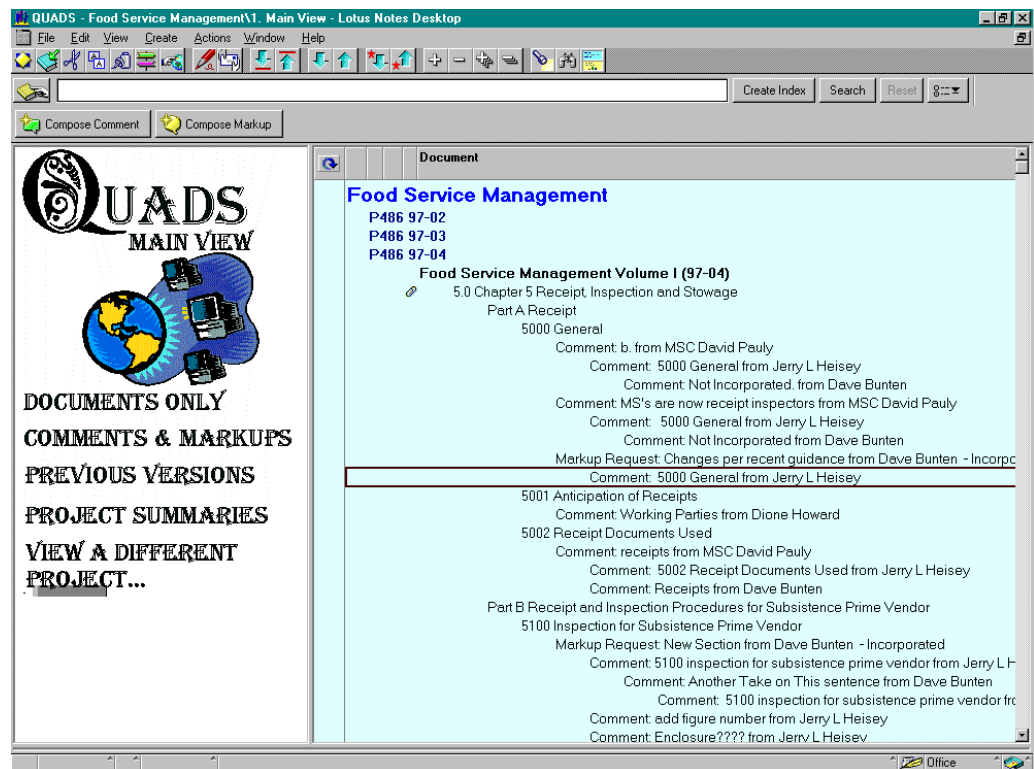


Figure 5.32 *Comment on a Markup Request*

As can be seen in Figure 5.32, the comment “5000 General” pertains to the markup request entitled “Changes per recent guidance from Dave Bunten.” This is evidenced by the fact that the comment appears directly below the markup request to which it applies and is slightly indented. To open this comment, scroll to it in the view, highlight it, and double click.

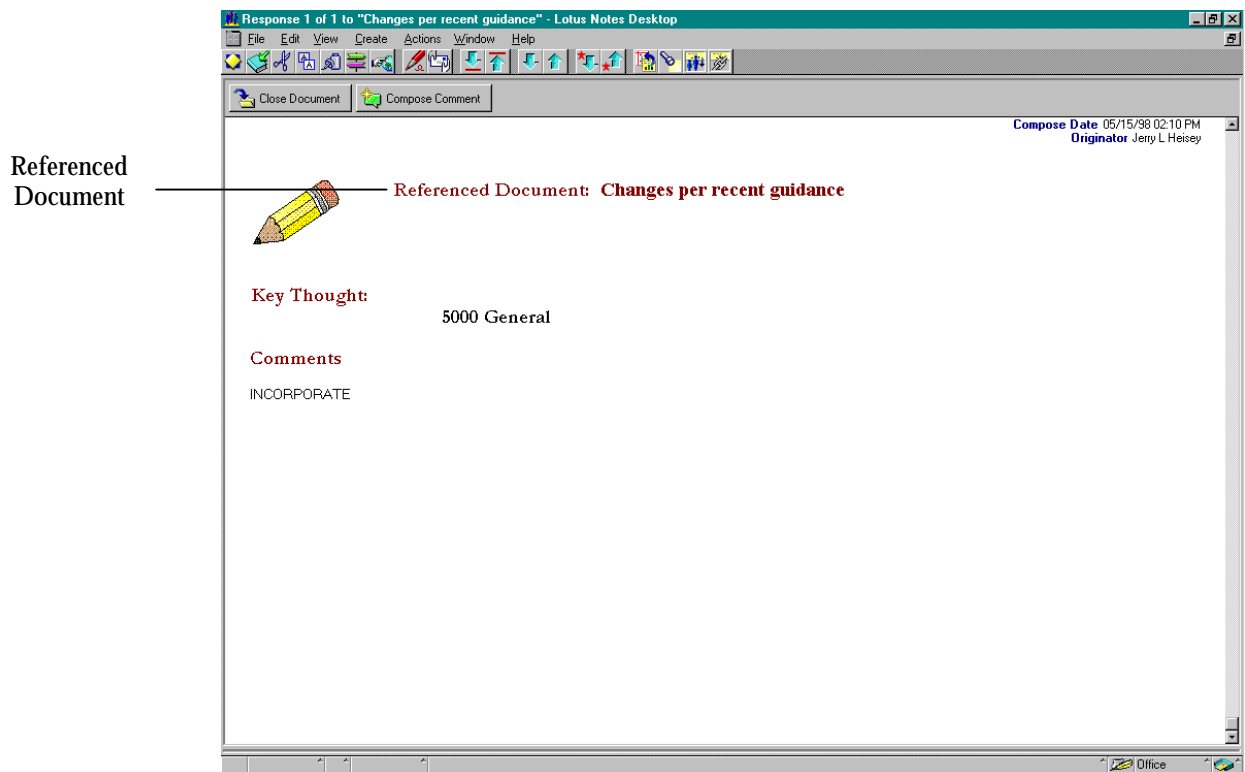


Figure 5.33 Reviewing a Submitted Comment

Once opened, the submitted comment will appear as shown at Figure 5.33. As you can see, the Referenced Document at the top of the comment form is actually the key thought from the markup request to which the comment applies, as opposed to merely a document section. This process of interleaving comments on markups and comments on comments can continue indefinitely and is the heart of the QUADS system.